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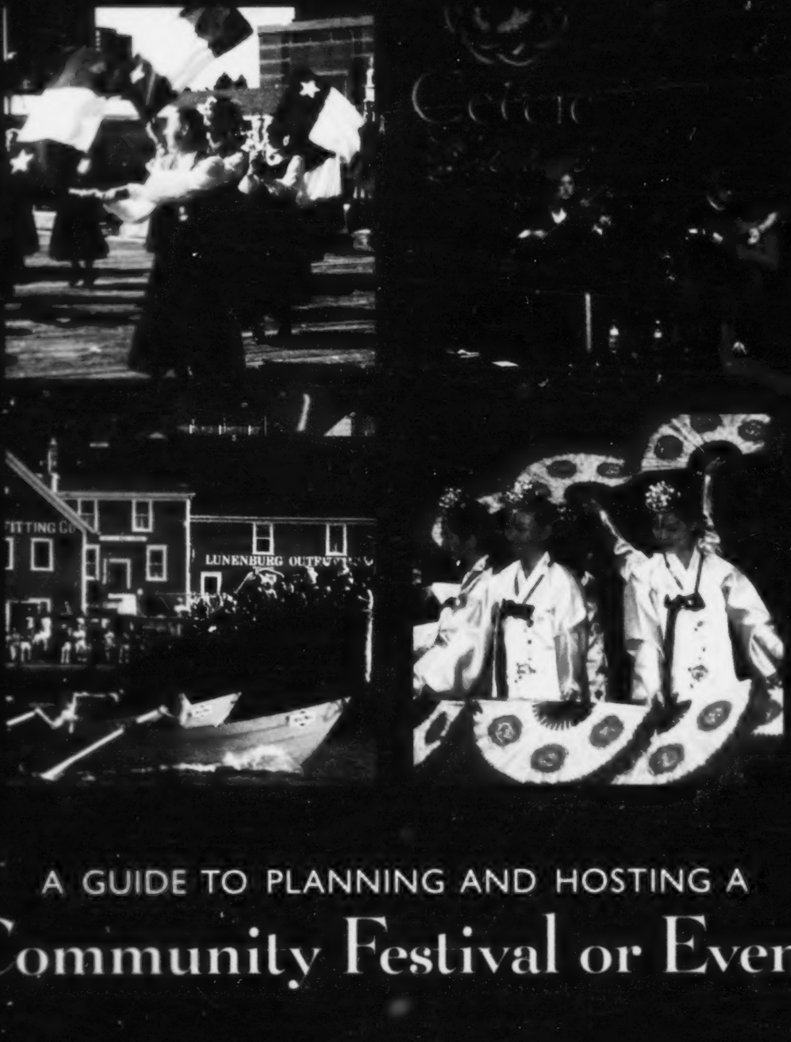

A GUIDE TO PLANNING AND HOSTING A Community Festival or Event

NOVA SCOTIA
Tourism Partnership
COUNCIL

NOVA SCOTIA
Tourism, Culture and Heritage

A Guide to Planning and Hosting a Community Festival or Event in Nova Scotia

Prepared by:

THE ECONOMIC PLANNING GROUP of Canada
Halifax, Nova Scotia

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SECTION 1

INTRODUCTION

SECTION 1

INTRODUCTION

1.1 Purpose of the Guide

This is one of a series of tourism development manuals commissioned by the Tourism Division, of the Nova Scotia Department of Tourism, Culture and Heritage. The manuals are designed to assist in the establishment of tourism businesses and in planning for the delivery of tourism services in the province. This manual deals with establishing a community festival or event, one that can attract more tourists and incremental tourist spending to your community. This manual is a new addition to the series in 2005.

Other manuals in the series deal with establishing different kinds of tourism businesses, including an accommodation property, campground, local sightseeing tour operator, restaurant, tourism retail business, adventure tourism operation and a receptive tour operator. There are also manuals on how to plan for, develop and market tourism in your community, on the operation and establishment of a local visitor information centre, on establishing an attraction and on marketing for tourism businesses. These other manuals were originally prepared in 1996 and 1999 and were updated in 2005.

The purpose of this manual is to provide you with information necessary to establish, improve, and operate a community-based festival in Nova Scotia, one that will be successful in attracting more tourists to your community. *A festival is defined as a celebration event that takes place over a scheduled period of time, usually on an annual basis, sponsored and hosted by one or more community organizations.* Although the main focus of this manual is on community festivals or event that attract tourists, the information will also be useful in planning other special events.

It should be noted that this information is a guide only. It is strongly suggested that the reader undertake efforts to verify any information on which their business plan is based and not rely solely on the information in this manual. There are areas where you may want to consider retaining appropriate professional expertise to assist you. While the information contained in this manual is believed to be accurate, as of the winter of 2005, it is not so warranted. The reader should note that federal, provincial and municipal regulations, taxes, etc. change frequently and it is recommended that you check with the appropriate authorities, listed in Appendix 1. This list includes representatives of the Tourism Division, Department of Tourism, Culture and Heritage, your local municipality and appropriate provincial agencies.

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1.2 Contents of the Manual

This manual provides information and advice on a variety of topics which will be important in understanding the requirements for success, assessing opportunities, planning and developing a festival or event, and initiating operations. The following topics will be covered:

- Developing your proposal
- Getting started
- Dollars and cents – generating revenues
- Organization and operations
- If something can go wrong…
- Marketing the festival
- Post event issues

1.3 The Role of Festivals in Community Life and Tourism

Festivals play an important role in celebrating features or aspects of a community that are special. A well designed festival can also become a valuable tourism attraction for a community. There are a number of positive outcomes that can be achieved:

- A festival builds community pride, spirit and self-esteem.
- It educates members of the community, particularly its young people, about the special attributes of the community; its culture, its history, its amenities for residents and visitors.
- It provides an opportunity for community members to participate in a variety of unique activities together, strengthening community relationships and quality of life generally. It can also help build and develop volunteerism in the community.
- Festivals can generate important social benefits within a community, helping to develop a sense of community and create an image of the community.
- A festival can help establish a 'sense of place' or identify for the community
- To the extent that the festival attracts visitors from outside the community, it generates tourism revenues, economically benefiting local businesses and the community as a whole.
- Festivals support the development of community recreational facilities and enhance quality of life in the community.
- They build awareness of the community and its appeals as a place to live, or to establish a business. Indirectly this supports the community's economic development efforts.
- In some cases, festivals can help support a revitalization of the community or its mainstreet. For example, appearance improvements made for an annual celebration can have year round benefits and stimulate the community to continue efforts such as downtown streetscaping.

1.4 Resident and Tourist Markets

The potential target markets for a festival include both local residents and tourists. Some festival organizations are content with attracting local and regional residents, and they design their programming to that end. Others want their festival to generate economic benefits for the community by attracting tourists, either from elsewhere in the province or from outside Nova Scotia. These may be individuals already visiting the community or new tourists that can be attracted to the community for the event itself. This manual focuses on approaches to maximizing attendance from both local/regional resident markets as well as tourist markets. It should be an early decision of event organizers which of these market segments should be given priority.

Definitions

Throughout this manual, the word 'tourist' has been used to refer to visitors who meet the nationally accepted definition of a tourist. A tourist is a traveller on an overnight trip away from home or who travels more than 80 km one way on a same day trip, for any purpose including pleasure, visiting friends or relatives, or business. It does not include persons commuting to work. This definition is used in the calculation of tourism activity in Canada, through data such as the Canadian Travel Survey The reader should note, however, that the trip distance for same day trips is being reduced to 40 km, effective for data that will be released in 2006.

The word 'visitor' is used to refer to any person attending the festival or event.

1.5 Requirements for Success, In a Nutshell

As an overview of what is to come in this manual, the following elements all play a role in making your festival a success. Each will be addressed in turn in the sections to follow:

- A strong concept is very important. It must be rooted in aspects of life the community values and wishes to celebrate. It also must be well designed to attract its target audiences
- Strong governance, provided by a board of community champions and leaders
- Competent management, either paid or volunteer, provided with the authority to get the job done.
- A strategy for revenue maximization
- Careful planning and budgeting
- A good site in terms of convenience, appeal, visibility and required support facilities
- Professional assistance in critical areas
- Community support
- Municipal government support, permits and technical/logistical assistance
- Ability to attract sponsors and partners
- Solid contracts with suppliers and service providers (concessionaires, etc.)
- Cost and revenue control
- A vibrant volunteer program
- Adequate funding
- Effective marketing and media relations
- Security and risk management programs
- Nurturing long-term partners and sponsors 'for next time'

There are additional requirements for making your festival a success in generating tourism for your community and area. These are addressed in the next section.

SECTION 2

Developing Your Festival Proposal

SECTION 2

DEVELOPING YOUR FESTIVAL PROPOSAL

2.1 The Concept

So You Have An Idea, Then What?

Developing a festival starts with an idea. Ideally this is a strong, unique and creative idea seeded in an individual with energy, leadership and vision. The idea then needs legs. It needs the initial visionary and a capable team to move it forward, evolving it into a real project.

To create a vibrant and successful festival, organizers need to clearly define their objectives. What are the audiences you want to reach and draw to your festival? What kinds of experiences will be offered by the festival?

Building a full concept for the event is a critical early step in the event planning process. The concept will be a description of the **What**, **Why**, **Who**, **When** and **How**, of your festival:

- What? – the experience
- Why? – the objectives
- Who? – the audiences
- When? – the date(s)
- How? – the people and organizations involved in making it happen

It is suggested you deal with the **Why** and the **Who** before the **What**.

Why? - Your Objective(s)

A festival is a celebration. What is it you want to celebrate? What is the purpose of the celebration? What is it you hope to achieve in the end? Organizers will want to clarify answers to these questions as a first step. Common objectives include:

- Educating others in the community about your particular cultural heritage and improving understanding of the community
- Simply having a fun event with others of like mind in the community
- Commemorating an important aspect of the community that is a source of pride. Perhaps it is a famous person who lived there or an important event that took place there. The Stan Rogers Festival in Canso is a good example.
- Attracting tourist visitors to the community to generate tourism spending
- Creating awareness of your community and its unique appeals as a place to live and/or establish a business

Be as clear as you can in defining your objectives and what it is you intend to accomplish.

Who? - The Target Audiences

Who are your target audiences? Answers to this question should spring from your objectives. Target markets can be defined geographically, demographically, psycho-graphically or by affinity.

Geographic Markets

Is it local residents? Is it a segment of the local community? Is it other Nova Scotians? Is it new tourists to the region and/or the province?

Demographic Markets

Who within the population are you seeking to attract? Is it young people, families, empty-nesters, seniors, etc.?

Psycho-graphic Markets

These are the special interest market segments, and there a lot of them – music fans, sports fans, hobbyists, car buffs, sailors etc. Within many special interest markets there are clearly defined sub-markets. As an example, within a special interest market segment such as music listeners there are groups that listen to specific types of music, e.g. country, jazz, blues, gospel, rock etc. Many festivals are themed for special interest segments. A bluegrass music festival is an example. An antique car show is another example.

Affinity Markets

This involves people attached to an organization such as a religion, sports club, car club, etc. In this case the organization is targeted in order to reach its members. Usually affinity markets are targeted in the context of their special interest.

In the context of your objectives, identify the audiences you intend to target in order of priority. Pay attention to the question of how you are going to reach your target markets with the marketing resources available to you. This may influence which ones you choose to target. Affinity groups can be reached through their organization, while geographically-defined target markets need to be reached through the mass media which often requires repetition to be effective and is expensive.

What and When? The Festival Experience and the Date

The concept behind the festival needs to be a compelling idea, one that captures the imagination. It needs to be exciting. It needs to be strong enough to attract the interest and support of others in the community, particularly those you are looking to get involved. Ultimately it will need to attract the interest of the audience you wish to attend.

If you are targetting tourist markets, it also needs to be unique, something different from what others are doing, something that is appropriate and legitimate for your community to claim ownership to.

Check out the competition. Are there other festivals and events that have similar themes and/or that attract some of the same markets you plan to target? Are there events that have the same date you have in mind? If you want tourists, plan yours to be different in all three respects.

You should think like a professional marketer thinks with respect to how your festival is going to be represented in the marketplace. It should have strong **Unique Selling Propositions** (USPs) that will capture attention and interest. The event should be 'positioned' in the marketplace as an experience that is different, compelling and not to be missed. And, it should have a strong and readily recognizable theme that connects with the target audience, communicated in the form of a brand. The brand is made up of the name and a logo, sometimes accompanied by a tag line.

The scope and scale of the event is key. The number of things to do and see, and its duration needs to be appropriate in a number of respects:

1. What is the likely number of attendees? Being busy is better.
2. What resources are available (funding, sponsors, volunteers, etc.)?
3. Does the event have sufficient scope to attract the target audiences?

Event scope shouldn't be restrictively narrow and specialized. In order to be successful in attracting the desired level of attendance, a festival needs a broad enough scope to appeal to the various markets available. At the same time, it shouldn't be so broad that it loses focus on what it is about.

It is a common opinion that with new festivals/events, a modest start is a good approach. A new festival/event might want to consider keeping things short in terms of hours and days of operation. It is far easier to build on a successful first edition, adding hours and days as appropriate.

When it comes to programming, there are some general theories. Programming should be fun, and not overly serious. People generally come out to events to have fun and be entertained. Programming should fit the theme and be fresh and highly enjoyable. Leave it to people to opt in and out of programmed events. Programming should be flexible for the visitor, allowing them to add, subtract, mix and match the available activities and events on site.

Above all, remember the KISS (Keep it Simple, Stupid) principle. In spite of what we've said above, keep things as simple as you reasonably can.

Sometimes it's possible to attach your event to another event. This might be a larger, more successful project, or a more established event. This strategy offers a number of potential advantages relating to marketing, appeal to the visitor and operational efficiencies. As an example, you might link a culinary event to a harvest festival. This is a reasonable proposition given that the two events are complementary in theme and experience; they cater to similar audiences and provide mutual benefits to the two organizing groups.

How? Making it Happen

Early on it is important to consult with community leaders, business leaders, community associations and the public. This will give these stakeholders an opportunity for input and an opportunity to share in the ownership of the event by becoming an active supporter and participant. It will also help to identify likely pitfalls in making the festival happen. Pitfalls can then be dealt with early in the planning stage. Community buy-in and the grass roots involvement of the community in planning and running a festival/event is critical to success and the importance of building this involvement and support early in the planning process cannot be overstated.

Spreading Your Wings - A Festival as a Tourism Generator

Organizers intending to attract tourists from outside the community should keep some special considerations in mind:

- The theme for the festival must be of interest and relevance to your target tourism markets and not just the local audience.
- The experience must be extensive and appealing enough to motivate people to travel. There is a rule-of thumb that suggests an event needs to meet the "4 times" standard – the experience needs to be four times as long as it takes to travel to and from the event.
- Promotion of the festival must be done to the target visitor markets.
- There must be appropriate signage to direct visitors to the site.
- There must be appropriate visitor information services in the entry area such as on accommodations, restaurants, maps, etc.
- Orientation information should be provided about the festival.
- The event should have the capability of handling groups, including tours and corporate/association.

While tourists passing through your area at the time of the festival may be an easy sell, motivating people to travel to the festival is a tougher challenge. How far will people travel to attend the event? It is important to consider the average length of stay of festival visitors. Length of stay is a factor of (a) the number of things to see and do (b) the amount of time each activity takes and (c) the expected percentage of visitors likely to participate in each activity. It is appropriate to add 20% to the calculated average to factor in time for meals, shopping, rest stops etc. Remember the 4 times rule. Divide the average length of stay by four and that will give you an approximate 'market reach'. To put it simply, if your festival is going to keep people occupied for 4 hours, then you should target a market reach of up to one hour driving time.

The festival may also have interest to tour operators. These businesses may build a package or a group tour centred on the festival experience. The scope and appeal of the event will dictate how feasible this might be for the tour operator. Prior to embarking on packaging initiatives, organizers will have to address group handling requirements, including a reservations system and the ability to customize and coordinate special programs designed for them.

2.2 The Strategy

With the event's concept firmed up, efforts should switch to an operational stage geared at moving the project forward. Issues to be addressed include:

- Selecting the site or sites and getting necessary approvals. This is addressed in Section 3.
- Maximizing participation and revenues from target audiences, and from partners, sponsors and supporters. These are the topics covered in Section 4.
- A plan of how you will organize and implement the festival – Section 5.
- A plan for safety and security – Section 6.
- A plan for promotion and publicity – Section 7.

- Planning for post event issues – Section 8.

But before you deal with the details of all these things, you will need to address them in a broad, conceptual way. You still have to 'sell' the stakeholders and the community as a whole on proceeding with the festival, so you need to identify in a general way how you intend to deal with these various challenges. We suggest you review the other sections of the manual to develop your initial proposals on these matters.

2.3 Market and Feasibility Assessment

As part of the decision to proceed with a festival or event, financial feasibility needs to be addressed. As an overview, the following issues should be addressed:

1. The attendance and revenue potential for the event, including funding from sponsors and others in the community.
2. What it is going to cost to stage the event, including its organization, implementation and promotion.
3. Illustrations of comparable festivals elsewhere and how they have performed with respect to 1 and 2.
4. An analysis of competing events at the same time in the province and how they might impact yours.
5. Projections of expected capital costs for facilities and infrastructure.
6. Projections of attendance and revenues, and of operating costs prior to, during and following the event.

Exhibit 1 provides a template to assist you in estimating the attendance potential for your festival/event and Exhibit 2 provides a template to use as a basis for determining your potential revenues and operating costs.

Determining whether your festival or event can sustain itself financially is an important step in your planning process. You should strive to ensure that the festival/event is self-sufficient, based on a reasonable and realistic set of assumptions with respect to visitation and revenue sources.

2.4 Selling the Idea and the Proposal

With a strong concept, operations strategy and positive feasibility assessment in hand, it is time to secure commitments from potential partners. Partners will likely include key organizations in the community that will be critical to the festival's success, as well as external supporters.

An important thing to keep in mind when "pitching" the proposal to various groups is the WIIFM Rule ('What's In It For Me'). Find out about what is important to the target audience then tailor your pitch accordingly. Just telling them why it will be good for you isn't enough; it has to serve their interests as well.

EXHIBIT 1
ESTIMATING POTENTIAL ATTENDANCE AT YOUR FESTIVAL OR EVENT

Target Markets (Column A)	Where to Get the Data	Penetration Rate (1) (Column B)	Potential Visitors (Column A x Column B)
Resident Markets			
Local Residents	www.statcan.ca Follow the links under Community Profiles to find data on your community		
Regional Residents	Same as above		
Residents of other parts of Nova Scotia	Same as above		
Special Interest Markets (Identify those specific to your festival/event)	• Membership in clubs, special interest groups, etc. can often be found on the web • Experience of other festivals		
Tourist Markets			
Tourists already in your community/area	• Local tourist association or Chamber of Commerce • Nova Scotia Tourism Partnership Council (www.nstpc.com and check under Research, Research reports and then Industry Performance Studies for Visitor Survey reports and Visitor Traffic Flow Report)		
Tourists Elsewhere in Nova Scotia	• Tourism Insights (monthly statistics on tourism activity in NS – www.gov.ns.ca/dtc/ and look for Tourism Insights • Visitor Exit Survey reports (see reference above) •		
Special Interest Markets (Identify those specific to your festival/event)	• Membership in clubs, special interest groups, etc. can often be found on the web • Experience of other festivals		
Total Potential Visitors			**Sum of the above**

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1 This is the percentage of each market that you anticipate will visit your festival/event. It is important to consider the potential for multiple visits by each market. For example, 10% of local residents may come 3 times each which means you would actually get 30% of the market.

EXHIBIT 2
ESTIMATING POTENTIAL REVENUES AND EXPENSES AT YOUR FESTIVAL/EVENT

Category of Revenue or Expense	Basis for Estimate	$ Amount
Revenues		
General Admissions	Calculate based on total visitors who will be paying admissions x average price	
Special Event Admissions		
Other Admissions	Add as required	
Food & Beverage Revenue or Revenue from F&B Concessions	Calculate based on estimate of average spending per visitor on food and beverage OR estimated revenue from F&B concession operators, as per your agreements	
Retail Revenue or Revenue from Retail Concessions	Calculate based on estimate of average spending per visitor on retail purchases **OR** estimated revenue from retail concession operators, as per your agreements	
Revenues from Fundraising		
Sponsorships		
Community Fundraising		
Donations		
Grants		
Other Revenues		
Parking Fees		
Total Revenues		
Cost of Sales		
Food & Beverage	% of F&B revenue if you are providing the food service directly	
Retail	% of retail revenue if you are providing the food service directly	
Total Cost of Sales		

Category of Revenue or Expense	Basis for Estimate	$ Amount
Operating Costs		
Salaries & wages		
Administration		
Insurance		
Entertainment & Programming		
Security		
Marketing and Promotion		
Site Operations		
Guest Services		
Other Expenses		
Total Operating Costs		
Operating Surplus (Deficit)		

Local Government

Are municipal councillors concerned with the quality of life for the community's citizens? Do they want to raise the profile of the community? Are they wooing corporations to relocate? Are they keen on tourism development? Are they keen on strengthening the sense of community among residents, or overcoming cultural conflict? Will the theme of the proposed festival strike a cord with residents as something they believe can benefit the community in one of the previous respects? How can an event team make sure it does?

There are many resources available to assist you in various levels of government, such as municipal recreation, parks and/or tourism departments. Local Chambers of Commerce or Boards of Trade may also be able to provide some assistance.

Other Governments

Will your festival benefit tourism for the region and the province? Does it support the agendas of other departments of the provincial government such as Tourism, Culture and Heritage, Education, Economic Development, Agriculture and Fisheries and so on?

Corporate Sponsorship Prospects

Corporate sponsors can help by a) providing products they sell, b) promoting the event as part of their own marketing or c) making a financial contribution in return for the right of linking their name to the event.

Does the company sell a product that is bought by the target audiences for your festival? If so they are a prospect for helping promote the festival through their own marketing, and perhaps through a financial contribution as well. Do they sell a product that can be used at the festival? If so, they are a prospect for an in-kind gift or loan of equipment.

Is the theme of your festival one that would reflect well on a particular company? Will association with the festival provide the company with favourable publicity? If so, they are a good prospect for cross-branding and financial sponsorship.

An effective way to approach corporations is to get a short, face-to-face meeting with the sponsorship decision-maker. Promise to keep this meeting to twenty minutes and bring only bullet-point information on your event, your organization, your past accomplishments, your target markets and expected attendance. The information package should be basic, to the point and designed to entice their interest. Ideally it should also address how the festival can benefit the company.

It is important that you meet the appropriate person, give them a general overview of what you are doing and ask them what they look for in a sponsorship. As an organizer you may have a perfect idea of how they can participate and mention it right away. Otherwise, it is common to say that you will promptly develop a proposal and get back to them. Either way, develop your idea for this corporation and get a formal proposal to them within a couple of days. The basic sponsorship package will stay the same for all sponsors; however, specific proposals will need to be developed for each prospect catering to their specific needs.

Community Organizations

Which organizations stand to benefit from the festival? They should be targeted for the kind of assistance they might provide. They might even be willing to join forces and partner in staging the event. Organizers should first determine which organizations can help them and the event? The next step is to meet with them and explore how they might help, and how doing so might benefit them as well.

Are any groups likely to be negatively affected by the event? They should be met with to see what if anything can be done to overcome the potential negative impacts and facilitate positive outcomes.

SECTION 3

Getting Started

SECTION 3

GETTING STARTED

Once you have completed the planning steps outlined in Section 2, it is time to get started with organizing. You first need a committee if you haven't already got one.

3.1 The Start-up Committee

The initial organizing group may be an ad hoc group to get the event started and then hand it over to a longer-term Board of Directors to oversee its implementation. Conversely the Board of Directors may be established right away. Either way, the initial group needs to have the following kinds of people involved:

- The visionary(s) – the person/people who had the creativity in coming up with the original idea and can build commitment to the concept
- Champions – enthusiastic supporters who are also influential in the community
- Leaders – people who can organize, motivate and get things done
- Sellers – people who are good at going out and selling the event to target sponsors and partners
- Influencers – people who can build and maintain support with key organizations in the community that are important to the event's success
- Doers – people that can be depended on to get things done and are willing to do anything that needs to be done

3.2 The Site (or Sites)

Desired Features

There are a lot of variables that can make or break a festival, and choosing a site is perhaps one of the most important decisions. You need to take into account:

- Access for visitors and suppliers
- Impact on the community and surrounding communities
- Adequate capacity and resources for your audience
- Services available
- Options in case of nasty weather
- Local sensitivities or issues; and
- Timing. Is the site available for a sufficient time for set-up and tear-down?

In order to ensure a healthy future for your event, it must have a positive impact on the community. The festival concept may be wonderful, and you and your Board of Directors expect positive impacts in the form of economic benefits from increased tourism to your area. But, if this comes at a price of blocked roads where residents aren't able to get to local shops, loud music that can be heard in people's basements and access to parks that is restricted or completely cut off, then community support can quickly turn sour and any promised economic impact forgotten.

Festival sites can successfully be planned for the centre of a town or city complete with road closures, restricted street parking, and music, as long as the community is well aware of all the impacts. It is imperative for festival organizers to respect noise by-laws and other regulations and to make concessions for residents in terms of access to their homes, businesses and parking.

It may, on the other hand, be preferable to have the festival or event a little outside of town.

Traffic Control and Parking Capacity

Here are some things organizers will want to look at when considering a festival site:

- Can signage be posted on the highways leading to the site?
- Can directional signage be installed on local streets to guide visitors to the site and parking areas?
- Is access to the site and parking an issue? Is there a left hand turn from or onto a busy street? You may be required to hire police officers to direct traffic in such a case.
- Is there a secondary access to the site for suppliers, staff, volunteers and entertainers?
- Is there parking available on-site for all visitors? There should be a Plan B if that site fills up.
- There may only be parking on-site for staff and volunteers, concession operators, handicapped visitors and entertainers. If this is the case, organizers will need to have lots of signs leading up to the site directing general visitors to off-site parking. Easy to read accreditation for the vehicles allowed on site will be imperative for trouble-free on-site parking. On-site parking is a very coveted privilege; make sure friendly but firm and diplomatic staff is posted at the on-site parking gate!
- Is there room for a drop-off and pick-up area? This needs to be strictly supervised so it doesn't end up a very disorganized and unexpected parking lot!
- If you are operating a shuttle service to a parking area it is important to make sure the way in and out and the pick-up/drop-off is not congested so the shuttle can run smoothly.
- Are tour buses expected? Where will they drop-off, pick-up and park?
- If you are using a field or other unpaved area for parking, what are the options if it rains for a week before, or during, your event?
- If you are charging for parking, make sure the signage is plentiful and clear before visitors enter the parking area. Also ensure that there is adequate room for them to turn around or keep moving forward if they choose to park elsewhere.
- Work closely with the local parking enforcement authority to determine parking options. If there will be additional traffic restrictions on surrounding streets, make sure they are well marked.

Shuttle Service

Shuttles are a way to ease up on congestion around your festival site and move visitors efficiently. Once again information to visitors is a very important element. There needs to be lots of signage leading to the parking area and pick-up/drop-off points for the shuttle service. Press releases and advisories to the local media specifically about the shuttle are also helpful.

A shuttle bus should normally be a free service for your visitors. For a shuttle service to be effective, it should run at least every 15 minutes. Make sure it operates late enough to get everyone back to their vehicles at the end of the evening!

Weather

Any outdoor event is subject to Mother Nature's surprises. Snow and freezing drizzle in May? Thunderstorm with 80km/hour winds on Canada Day? Thaw in January? Clearly, you can't control the weather, but you can plan for it. Where will the crowds go in case of rain? Will they huddle under food concession tents until it blows over? Can the shuttle service get them back to their cars quickly? Do you have the possibility of re-scheduling? Can you move a concert or other element of programming to an indoor facility?

Keep in close contact with the local media and let them know immediately if there is a change in venues or programming. Remember to keep your staff and volunteers fully informed.

On the other end of the spectrum, you may be unexpectedly overwhelmed with visitors if the weather is hot and sunny. Will you be ready for 20,000 people at your gate when you were expecting 5,000? Do you have a ready supply of spring water for sale?

Services

A festival site may have everything you are looking for in terms of parking, size and sufficient separation from the neighbours, but if it doesn't have services, you could be adding unforeseen expenses to your operating budget. Here are some things to watch for:

- Does the site have sufficient electrical service? Does it have enough capacity for your staging, concessions, lighting and other needs? Will you need to rent generators?
- Is there adequate existing lighting?
- Is the site on the local bus service route, or will all your visitors have to arrive by car? If there is bus service, what time does it start/finish?
- What is the drainage situation? If it rains for days before the festival, will there be a big pool in the middle of the field where your stage is supposed to go?
- How will the fire department access water in case of a fire on site?
- What about access for fire engines, ambulances and police vehicles?
- Is the ground level and easy for visitors to walk around? Can wheelchairs move freely?
- Are there washrooms on site, or do you have to rent 'Johnny on the Spot' service?

Festival Office/Logistical Facilities/Volunteer and Staff Space

Festival Office

The on-site festival office will need the same equipment as the day-to-day office. This includes computers and printers, fax machine, photocopier, telephones and office supplies. The office needs to get set up at least a few days before the festival. Communication lines for phone and fax along with internet connections will need to be installed. This usually takes a few weeks of notice to the local phone company. Event organizers should start working on the list of items needed and the logistics of the move well in advance of the move. The office often gets overlooked and there ends up being a mad panic three days away from your event trying to identify office equipment rental companies or moving companies.

Logistical Facilities

The logistics staff and volunteers are the crew who pull the festival together literally from the ground up. They install fencing and barricades, move tables, set up tents, place trailers, help with stage equipment, erect signage, and a million other hands-on details. They need a secure headquarters location to store equipment, supplies and tools.

Volunteer and Staff Space

Volunteers and staff generally put in long hours at festival time. They are busy and on their feet most of the time. It is beneficial to have a separate area, away from the hustle and bustle and unending demands on them, for them to eat, relax and socialize. One of the perks of working at or volunteering at festivals is the camaraderie that is created. A welcoming and comfortable gathering area can help facilitate this.

Storage and Holding Area

There will be some equipment and supplies that need to be stored. Valuable items will need to be in a secure area while others can be stored in a tent or under a tarp. You may be able to use existing facilities, or rent a tent or trailer.

Security staff may have to be contracted a few days before the site opens because of the value of storage items. Security will have to be kept in the loop as to what is on site and when deliveries are expected. Perhaps most importantly, they will need to know who has the authority to remove items from the site.

Clearing and Registering the Date

Organizers will want to ensure that there are no conflicting dates with other festivals in their community or surrounding communities. Many towns and cities have a centralized schedule that outlines all events and activities in the area. This may be available through the Town Office or City Hall or the local Chamber of Commerce or Board of Trade.

Some sources to check for potential date conflicts:

- Parks and Recreation Department
- Local tourism office
- Economic Development Department
- Local service clubs like Rotary Club, Lions Club, Legion, Knights of Columbus
- City Hall, or regional government
- Police
- Community newspaper or radio
- Chamber of Commerce
- Board of Trade
- Visitor Information Centre
- Churches

Essentially, you want to make sure you are not competing for the same market. If there is another event planned in close proximity and for the same day, it is wise to work with them in coordinating your programming schedules.

3.3 Approvals and Permitting

Approvals and permitting are specific to each municipality and there are also a number of provincial approvals required. Ask at the local municipal office whether there is someone on staff who can meet with your group to go over the specifics of local permits needed. Organizers will also need to approach several provincial departments. These are discussed in more detail below. Approaching other events in the region and speaking with the General Manager about their experiences will give you invaluable information and may save you a lot of time and energy down the road.

A special event permit may be required by the municipality. Find out the timelines involved. Some permits may require that the paperwork has to be done up to eight weeks before the event. If there is a charge for a special event permit, use of a public site or for special services, always ask if there is a financial break for community groups or non-profits.

Here are some of the other approvals you might need:

- A land use agreement may be involved for the use of the site.
- There will be health issues (addressed by the Department of Agriculture and Fisheries) with respect to food service on site
- Fire protection, emergency access and services
- Food service/concession establishment permits
- Vendor permits for retail outlets on site
- Liquor licenses for on-site alcohol service
- Employment-related requirements for festival staff and for contract/concession staff (e.g. Workers Compensation Board)
- Off-site traffic control, street/sidewalk closures, signage, banners, parking meters
- Fireworks
- Parade permit
- Noise bylaw exemption for scheduled times and sound levels

Event organizers shouldn't be intimidated by all of the permits required. The application forms and the process of obtaining these approvals and licenses/permits are generally fairly simple. It does; however, take a bit of time and this should be budgeted. If you have done your earlier work in building community support for the event, that will go a long way towards getting the officials involved to be helpful in resolving permit issues for you.

A discussion of the permits and approvals you may need, as well as sources to check out any additional requirements, are described below.

3.4 Legal, Regulatory and Tax Matters

This section addresses legal, regulatory and tax matters to be considered when developing and running a festival or event. There are a multitude of laws and regulations that might affect a festival or event, and readers should note that the information contained in this section is a guide only.

It is strongly suggested that the reader undertake efforts to verify any information that might be relevant to their festival/event, and not rely solely on the information in this manual. There

are areas where you may want to consider retaining the appropriate professional expertise to assist you.

While the information in this manual is believed to be accurate, as of the winter of 2005, it is not so warranted. The reader should note that federal, provincial and municipal laws and regulations change frequently, and it is recommended that you check with the appropriate authorities, listed in Appendix I, including your local Business Service Centre (on line at www.gov.ns.ca/snsmr ***or at Access Nova Scotia centres around the province), to obtain up-to-date information on laws that may affect your business.***

Regulations and Licensing

Municipal Regulations and By-Laws

Municipal regulations and by-laws vary from municipality to municipality. It is very likely that your municipality will have a number of regulations that your festival/event will have to meet. Examples might include by-laws governing noise. These may limit hours of operation., Other concerns are signage, the types of events you can hold, traffic, parades, fireworks, selling food or retail items (e.g. municipal vendors license), food handling, etc. You may also require one or more permits from your local municipality. It is strongly recommended that you contact your local municipal office early in your planning process to determine what licenses/permits you will require and what regulations are in place that might impact the nature, location or timing of your festival/event.

Department of Environment and Labour

The Nova Scotia Alcohol and Gaming Authority, which is under the Department of Environment and Labour, is responsible for issuing Outdoor Festival/Concert Licenses as well as Liquor Licenses. There are several regulations and licenses under this Department that may be relevant to your festival/event, including the Occupational Health and Safety Act. These are all listed at www.gov.ns.ca/enla/pubs/legislat.htm .

Place of Amusement License

If you plan to hold an outdoor festival or concert in Nova Scotia, you will need a Place of Amusement License (Outdoor Festival/Concert) from the Department of Environment and Labour - Alcohol and Gaming Authority. You can apply by phone, fax, mail or in person. It takes 3 – 5 business days to process a complete application. There is a fee. For information, check out the Alcohol and Gaming Authority website section on licenses at www.gov.ns.ca/aga/Licensesummaries.htm . Environment and Labour also requires that you obtain the appropriate permits from other agencies, as described later in this section of the manual.

Note that anyone who intends to offer an itinerant performance in Nova Scotia, that is one that travels from place to place on a circuit, such as a circus, also needs a Place of Amusement License (Itinerant). If you are planning such a performance for your festival/event, you should make sure that the appropriate license is obtained.

Liquor Licenses: Special Occasion

If you are planning to provide liquor service you will require a Special Occasion Liquor License from the Department of Environment and Labour - Alcohol and Gaming Authority. Information can be obtained from the same website as above. The Alcohol and Gaming Authority may require an Office of the Fire Marshal Inspection Report or a similar report from your local municipality.

There are also special terms and conditions associated with Special Occasion Licenses which can be found on the application form (www.gov.ns.ca/aga/Applications/Lq_Sp_Ap.pdf), including limitations on advertising. As well, outdoor event applicants must meet other conditions including:

- Restricting the licensed area to a tent or suitably enclosed area
- Obtaining approval from the Fire Marshal if a tent is being used
- Providing a diagram or sketch of the location where the event will be held

If admission is being charged, a Place of Amusement License from the Department of Environment and Labour – Alcohol and Gaming Authority, is required.

Other Licenses

The Alcohol and Gaming Authority also administers a variety of other licenses that you may require for your festival/event, depending on the type of activities you are planning. These include: Bingo Lottery License, Games of Chance Lottery License; Ticket Lottery Licenses (Under $500 and Over $500). You should review all the license requirements on their website to make sure that you are aware of all that might apply to the event.

Office of Public Safety – Elevator and Life Inspection Services

This office is responsible for the physical inspections of devices and temporary structures such as are used at carnivals, fairs and amusement parks. It is likely that if you have these types of activities at your festival, they will be managed by a concession operator. However, you should be aware of the regulations and the inspection requirements – they come under the Amusement Devices Safety Act and can be found at www.gov.ns.ca/just/regulations/regs/adsgen.htm .

Water Systems

There are regulations in place governing the testing and monitoring of drinking water on a regular basis. You should check with the Department of Environment and Labour (Environmental and Natural Areas Management Division) to determine if your festival/event is responsible for any of these regulations.

Office of the Fire Marshal

If you are planning to use tents, you will require the approval of the Fire Marshal and there will be limitations on the number of persons that can be accommodated in the tent. Contact the Fire Marshal's office in your area or through the website (www.gov.ns.ca/enla/ofm/) to review your plans and obtain approval. If you are using other facilities that are already approved by the Fire Marshal, there will be capacity limitations in place that you will have to adhere to.

Fireworks fall under the jurisdiction of the Fire Safety Act which is also administered by the Office of the Fire Marshal. The act states that "the handling and discharge of fireworks … shall conform to the "Fireworks Manual and Pyrotechnics Special Effects Manual, 1997" published by the Explosives Regulatory Division, Natural Resources Canada. The proposed draft regulations were under revision at the time of preparing this manual. Check out the website (www.nrcanncan.gc.ca/mms/explosif/over/over_e.htm) or the Explosive Regulatory Division of Natural Resources Canada Halifax office for more information on Display Fireworks regulations and courses. You may require a municipal permit for the discharge of fireworks as well.

Other Regulations under the Department of Environment and Labour

The Department of Environment and Labour is also responsible for occupational health and safety, public safety, and labour standards. Specific regulations that you should be aware of include:

- The Occupational Health and Safety Act. This act requires employers to adhere to operational and employee safety standards. Information on the act, as well as a 'How to Guide' can be found at www.gov.ns.ca/enla/ohs . Note that, depending on the number of people you employ on a regular basis, you may require a written Occupational Health and Safety Policy.
- Labour standards with respect to minimum wage, employee/employer rights, etc. A Fact Sheet providing general information on the Labour Standards Code is published on the Internet at www.gov.ns.ca/enla/labstand/lstcode/ or you can contact the Labour Standards Division of the Department for more information.
- The Pay Equity Act is administered through the Labour Services Division of the Department of Environment and Labour. Pay equity means *equal pay for work of equal value* and is a concept that bases wages on the value of work performed, regardless of whether a man or woman is doing the job.
- First Aid Regulations. There is a Guide to First Aid Regulations available at www.gov.ns.ca/enla/ohs/FirstAidGuide.pdf
- Workplace Hazardous Materials Information [WHMIS] Regulations. A guide to these regulations is available through the Environment and Labour website, Publications section, under Public Safety and Occupational Health and Safety. Note that the Nova Scotia Tourism Human Resource Council offers customized WHMIS training programs for the tourism sector. Check their website at www.tourismhrc.com for details.

Department of Agriculture and Fisheries

This Department is responsible for Food Establishment Permits which are required for anyone who wants "to operate a foodservice facility such as a restaurant, food take-out, mobile canteen, temporary food establishment, or a grocery store or push carts or any facility from which foods are sold, whether on a permanent basis or only occasionally". You can access information on how to obtain this permit at www.gov.ns.ca/snsmr/paal/agric/paal006.asp or by contacting the Department of Agriculture and Fisheries, Food Safety Section in Halifax or Truro.

Some municipalities require that all food handlers take the Food Handler Certification Course. Information on this course is available through the website noted above. Your municipality may require that you have a Municipal Vendors License in order to sell food.

Department of Transportation and Public Works

If your festival/event involves any activity (e.g. road race or fun run, parade, bike-athon, etc.) on a public highway that is outside the boundary of an incorporated Town or the urban core of HRM, you will need an On-Highway Event Permit from the Department of Transportation and Public Works. Application forms can be obtained from your regional DTPW office. Permits take approximately two days if all requirements are met, and stipulate the conditions that govern the conduct of the event. If the event is inside a town or the urban core of HRM, you can get the required permit from your local municipality.

There are no provincial policies in place as of Winter 2005 regarding the placement of advertising signage within the right-of-ways of secondary roads. You are advised to contact your local municipality regarding policies for advertising signage along public roadways. You should adopt a 'neighbour-friendly' approach and seek permission of abutting landowners before placing any signs. Organizers should also take measures to avoid blocking existing traffic signage or impede sight-distances. For signage on 100 series highways, see the discussion below under the Department of Tourism, Culture and Heritage.

If your festival site is adjacent to a provincial highway, you should also consult with the Department of Transportation and Public Works regarding traffic flow, turning, etc. You may also want to consider obtaining the assistance of the RCMP in managing traffic, particularly if you are expecting large crowds.

Department of Tourism, Culture and Heritage

Application is made through the Department of Tourism, Culture and Heritage for approving temporary festival signage on 100 series highways. These uniform blue 'festival tags' will be temporarily installed on the community's highway sign on the 100 series highway for major tourism festivals attracting 10,000 visitors or more. They can be installed up to 3 weeks in advance and are to be removed immediately following. The Department of Transportation and Public Works makes the signs (the cost of two festival tags in 2005 is $1,000); installation, storage and removal of the signs are the responsibility of the festival.

Requests for the 'festival tag' signage should be directed to the Tourism Division, Department of Tourism, Culture and Heritage. Information is available on the Department's web site www.gov.ns.ca/dtc/pubs/attraction_signage.pdf or the contact information in the Appendix.

The Department is also responsible for the Tourism Accommodations Act which includes campgrounds. If you are planning to have a temporary camping area as part of your festival/event, you will require a Special Event Camping Area License. Contact the Tourism Division of the Department of Tourism, Culture and Heritage or see their website at www.gov.ns.ca/dtc/tourism/tourism_inspections.asp for more information.

Department of Natural Resources

If you are planning open fires or campfires as part of your festival, you may require a permit from the Department of Natural Resources. Contact your regional DNR office for information.

Personal Information Protection and Electronic Documents Act

In January 2004, the federal government implemented the Personal Information Protection and Electronic Documents Act (PIPED). This piece of legislation is applicable to all organizations, including all private sector businesses and outlines the responsibilities of an organization relating to personal information collected and stored through the course of normal business activities.

The primary purpose of the Act is to ensure that the privacy of individual consumers is respected in that any personal information, including that relating to age, name, income, social status and credit records; is used for legitimate commercial purposes only and is stored or maintained in a secure fashion.

Following is a basic overview of PIPED:

- If your organization wants to collect, use or disclose personal information about people, you need their consent, except in a few specific and limited circumstances.
- You can use or disclose people's personal information only for the purpose for which they gave consent.
- Even with consent, you have to limit collection, use and disclosure to purposes that a reasonable person would consider appropriate under the circumstances.
- Individuals have the right to see the personal information that your organization holds about them, and to correct any inaccuracies.
- There's oversight, through the Privacy Commissioner of Canada, to ensure that the law is respected, and redress if people's rights are violated.

It is recommended that organizations develop in-house policies and procedures relating to the retention of personal information. Many businesses have now taken steps to include their privacy policy in their company literature and have it prominently displayed on company brochures, websites, etc.

The Office of the Privacy Commissioner has an online guide to PIPED and a number of fact sheets for businesses available through their website, which can be viewed at www.privcom.gc.ca; or by contacting the Office of the Privacy Commissioner of Canada at 1-800-282-1376.

Taxes

Harmonized Sales Tax

The Harmonized Sales Tax (HST) is a 15% value-added tax which replaced the former retail sales tax and GST in Nova Scotia. You have to register for HST if you provide taxable supplies in Canada and you are not a small supplier. Non-profit organizations (there are conditions that define these for GST/HST purposes) are considered small suppliers if "worldwide revenues from taxable supplies are $50,000 or less in the previous four consecutive calendar quarter. If, in any one calendar quarter, your total worldwide revenues from taxable supplies are more than $50,000 you will immediately … have to register for HST/GST."[1] If your festival/event is a private business, you are required to register for HST if your sales are $30,000 or more in a calendar quarter and over the last four consecutive quarters.

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[1] Source: Canada Revenue Agency, GST/HST Information for Non-Profit Organizations, Page 6

Even if you are not required to, you may wish to voluntarily register for and collect the HST. The advantage of doing this is that you can claim a credit called an input tax credit to recover the HST you paid for expenses and purchases used for the festival/event.

Once you are registered, HST will apply to most goods and services that you supply. Admission to a place of amusement is exempt if the maximum amount charged your customer is $1 or less; supplies or goods and services are exempt when all or substantially all (90%) are provided free of charge. There are numerous guidelines and regulations relating to HST/GST for Non-Profit Organizations. You should review the document, GST/HST Information for Non-Profit Organizations (available at www.cra-arc.gc.ca/E/pub/gp/rc4081/rc4081-04e.pdf).
We strongly recommend you contact the Canada Revenue Agency directly, and/or obtain professional advice on tax related questions.

When you register for the HST, you are given a reporting schedule to follow for your HST returns. This schedule is determined based on the volume of your revenues. When you complete your return, you deduct all your input tax credits from the HST you charged on your sales. You are required to remit the difference if the HST you collect is more than your credits; if your credits exceed your payables, you claim an HST refund.

Contact Canada Revenue Agency either in person, via phone (1-800-959-5525), by mail or through the on-line business registry at www.bsa.cbsc.org/gol/bsa/site.nsf/en/index.html and follow the appropriate links for an HST Registration Form.

Employment Taxes

As an employer, you are responsible for deducting income tax, Canada Pension Plan (CPP) contributions, and Employment Insurance (EI) premiums from the wages and salaries you pay your employees. You are also responsible for remitting these amounts on a monthly basis to the Receiver General for Canada, along with your share of CPP contributions and EI premiums that you pay throughout the year on your employees' behalf. You are also required to report these amounts on an annual information return and prepare annual T4 information slips for your employees. These regulations apply to any organization that is an employer, whether it is a for-profit or a not-for-profit organization. They also apply if you employ people for only very short periods of time.

The Canada Revenue Agency is responsible for ensuring these requirements are met. The department handles enforcement and some collection activities related to payroll deductions, prepares the Payroll Deduction Tables used by employers for calculating deductions, and determines employee insurable earnings for Employment Insurance and pensionable employment for the Canada Pension Plan.

Contact your local Canada Revenue Agency office or tax centre for more information.

Nova Scotia Workers' Compensation

Under the Nova Scotia Workers' Compensation Act, various industries are required to pay for compensation coverage to protect employees from income loss and medical expenses resulting from job-related injuries. Your festival may be required to pay Worker's Compensation under the Act. If so, you will be required to pay a premium based on the dollar value of wages you pay your employees. If you have three employees or fewer, you are exempt from this regulation.

Contact the Nova Scotia Workers' Compensation Board (www.wcb.ns.ca) for additional information regarding the types of organizations which have to pay premiums, the specific premiums applicable to you and a copy of the registration form.

Business Number Registration

The federal government business numbering system, or BN, is a numbering system designed to simplify the way businesses deal with government. When you start a business (for profit or not-for-profit) and open one or more Canada Revenue Agency (CRA) business accounts (e.g. corporate income tax account, payroll deductions account, or HST/GST account), you will automatically be assigned a unique Business Number which identifies you and the various accounts you have. This streamlined system allots you one number only with which to deal with the federal government. You can register for a BN on line at www.cra-rc.gc.ca/business .

In most cases, new corporations will automatically receive a BN from CRA within 45 days of incorporating at the federal or provincial level.

Contact the Canada Revenue Agency for a copy of the registration application form and guide, or register on line.

Registration of Companies – For Profit and Not-for-Profit

If your festival/event is operating as a for-profit business, you are required to register as a business with the Nova Scotia Registry of Joint Stock Companies. For more details on registering businesses, and on different types of business structures, you should review the manual on Establishing A Community or Commercial Attraction in Nova Scotia.

Incorporating a Non-Profit Society

A society is a non-profit organization which has been incorporated under the Societies Act. Incorporation of the non-profit organization is not mandatory, however, the benefits of incorporation such as limited liabilities for members, make this desirable. It is usually a requirement for obtaining funding through provincial and federal departments (ACOA, HRSDC etc.)

Any five or more persons wishing to incorporate as a non-profit society may do so under the Nova Scotia Societies Act through the Registry of Joint Stock Companies. A society incorporated under the Societies Act is a corporate entity separate and apart from the members, with the power to hold property and carry out objects set out in a Memorandum of Association.

The name of the society must be submitted for a Nova Scotia name search. This name search is free of charge and can be requested from the Registry of Joint Stock Companies or through Access Nova Scotia. If the name is available, it will be reserved for a period of ninety days. Once the name has been reserved, incorporation documents must be completed and submitted to the Registry or Access Nova Scotia along with an incorporation fee. An annual fee is charged to maintain registration, and you must also submit annual financial statements and a listing of Board members.

Registration as a Charity

If you are operating a not-for-profit festival, you may want to explore the possibility of becoming a registered charity with the Canada Revenue Agency which could provide some benefits to your fundraising efforts. Becoming a registered charity allows an organization to issue official charitable donation receipts for gifts received, which can provide the donor with some tax savings.

Once registered as a charity, the organization must devote its resources to charity, continue to meet the other requirements of registration and file a Registered Charity Information Return within six months of the year end.

To quality for registration, an organization must be established and operated for charitable purposes, and it must devote its resources to charitable activities. A charity has to meet a public benefit test, showing that:

- Its activities and purposes provide a tangible benefit to the public;
- Those people who are eligible for benefits are either the public as whole or a significant section of it;
- The charity's activities must be legal and must not be contrary to public policy.

In order to be registered as a charity, an organization must either be incorporated or be governed by a constitution or trust.

There are four general categories of charitable purposes, and to be registered, an organization's purposes have to fall into one or more of these categories:

- The relief of poverty;
- The advancement of religion;
- The advancement of education, or
- Certain other purposes that benefit the community in a way the courts have said are charitable.

You should contact the Canada Revenue Agency, Charities Directorate for additional information. You can also check out their web site at www.cra-arc.gc.ca .

SECTION 4

Dollars and Cents

SECTION 4

DOLLARS AND CENTS

A key factor in the success of any festival is careful attention to the organization's money matters – earned revenues, fundraising; financial security, financial controls and budgeting are some of the topics this section will cover.

4.1 Revenue Generation

Festivals are created for a variety of reasons. While many are non-profit, others are created solely to make money. Most often the event is based on someone's vision and passion, and making money is secondary. No matter their reason for being, all festivals need to have revenues so that they can, at the very least, break even.

Gated or Non-Gated Event

A 'gated' event charges for entrance and a 'non-gated' event does not. This may come as a surprise, but both can earn revenue. A gated event can cover its entertainment and programming costs from admissions fees, while a non-gated festival needs to do so by charging admission to particular entertainment programs. This requires a gated system for the entertainment venue itself.

The absence of an admission charge is likely to result in more attendance and multiple visits by individuals. This will drive concession revenues higher, allowing the festival to be more aggressive in contract negotiations with concessionaires. It also provides a basis for being more aggressive with sponsors since the audience size will be larger.

Admissions and Pricing

Doing a comparison of similar events and their pricing schemes is a good start in setting your admission fees. You will see that some events charge a 'one size fits all' admission and others create many levels and categories. Some categories to consider:

- weekday price
- weekend price
- festival pass (access to all programming, any day)
- one-day fee
- adults
- seniors
- child (5-12 years)
- under 5 (generally free)
- family rate
- school groups
- include or not include concerts and other programming in admissions

- tour group price
- corporate rates for employees
- sponsor rate for employees
- day-only or evening-only rates
- care-giver for handicapped person
- special rate for certain groups (i.e. firefighters)
- VIP area seating

Special Event or Entertainment Surcharges

On top of any other fees, you could also charge visitors an additional fee to see a special entertainer or participate in special programming. Examples would include a concert by a major performer, or attending an autograph session with National Hockey League stars.

Parking Fees

Parking fees are usually kept fairly low, particularly for gated events. These are collected either as a set fee or through donations. Sometimes a local service organization coordinates the parking and the fees collected will go to that group. Other times, an event is held on municipal or private land and the fees collected for parking are set and kept by the municipality or organization that owns the land.

As mentioned earlier, make sure that the signage leading to the parking is clear that there is a fee or that a donation is being requested. Drivers will want to make the decision to pay or look for free parking well in advance of the parking gate. No matter how much planning you do, you will still need to have some space for visitors to turn around to look for free parking because they did not notice the signs.

Food and Non-Alcoholic Beverage Sales

Food and non-alcoholic beverage sales are another source of revenue. These are not easy types of businesses to make money on, especially for a festival. There are food costs, labour costs and the added fees and costs of operating a food and beverage business outdoors, not in a normal restaurant setting.

For most other festival situations, organizers approach concessionaires who set up booths in buildings, trailers or tents. Festival organizers can ask for a flat fee or a percentage of sales (15-20% of gross sales is standard). A straight flat fee is easier to manage, but it is difficult to know the proper price to charge for the concession. Contracts with concessionaires outlining the financial details are a must. Some larger, more established festivals require a flat fee as well as a percentage of sales, but at a lower percentage rate. The difficulty with a percentage of sales model is that it presupposes honesty on the part of the vendors.

When planning these elements of your festival, you may find it useful to look at some of the and other resources available on the IFEA (International Festivals and Events Association) website. Several templates providing examples of agreements with concession operators are available through this website at www.ifea.com/resources/templates.asp

Beer and Alcohol Sales

Generally a festival can make considerable money through beer and alcohol sales. Festivals can recruit a volunteer group to run the beer tent for a small percentage of sales or even a flat donation to the group. The festival would provide a staff person as Alcohol Sales Coordinator to work out logistics and point-of-sale details, and the volunteer group would provide the staff and person-power.

Otherwise, you could staff the beer/alcohol sales with your own festival volunteers and staff. This takes a tremendous amount of recruiting and volunteer management. It is recommended that events have their volunteers trained through the "Its Good Business – Responsible Beverage Service Program" offered through the Nova Scotia Tourism Human Resource Council (www.tourismhrc.com) or other training required by the province Alcohol and Gaming Authority. You will also need the appropriate licenses. Check the Department of Environment and Labour website at www.gov.ns.ca/enla/pubs/legislat.htm for a listing of all licenses and links to details on what is required.

Retail Sales – Festival Sales and Concessions

Festivals often have souvenirs for sale that have the festival logo on them. These range from high-end items like sports bags and rugby shirts, to lower cost items such as t-shirts and pins. An event can usually charge a premium because of the logo placement on the product and the extra value it represents to the attendee.

The key to success is selling the entire inventory. Make sure that what the event purchases is something your audience will be interested in buying. It is not an exact science and just because tank tops with a beaded fringe sell out one year, doesn't guarantee they will be a success the following year! Things that traditionally sell well include t-shirts, caps, other outdoor clothing items, buttons, souvenir trinkets, costume jewellery and artwork.

Generally souvenir sales are more of a break-even situation than a money-maker. They do, however, have promotional value as well. The exception would be in the case of a specific fundraising item that is advertised as such and is clearly priced above the market. When visitors are aware of a cause or fundraising initiative, they are more likely to spend $5 for a 25-cent pin.

Concessionaires for retail items can also be contracted by the festival. As with the food and beverage sales, retail concessionaires can be asked for flat fee and/or a percentage of sales. Conversely, the festival itself can handle the retail program and keep more of the money, particularly if volunteers are available to staff the booths.

Product Sampling

Yet another form of revenue for a festival is to offer Product Sampling. This is when a company has a booth or tent on your site and offers samples of a new product to potential buyers. The festival could charge 5 cents to $5 per 'sample' issued, depending on the demographics of the expected attendees and the nature of the product. The sample fee would be based on a percentage of the attendance. As an example, if 5,000 people attend an event in one day, the company doing the sampling will probably only actually talk to and sample about 10% of the audience. In this case approximately 500 surveys would be completed

A company could also pay the festival a flat fee or make a donation. Keep in mind that sampling is market research and creates a business benefit to companies. Also it doesn't necessarily enhance the visitors' experience at your festival. It helps if the products are complementary to your festival's theme.

Corporate Functions

Your festival could play host to a corporate function either outside of, or during festival hours. Many festivals set up a separate area with a tent, tables, chairs, portable toilets, and hospitality service. Corporations book and pay a fee for this space and they can then send out special invitations to clients and/or employees for a networking opportunity, or a chance to say thank you. This concept could also be used as a sponsorship benefit, which will be discussed further later on in this manual.

4.2 Budgeting

Developing a sound and realistic budget for the festival before you get too far along in the process is critical.

Capital Budget

There will be capital cost items for on-site facilities, some of which were identified earlier in Section 3.2 with respect to the site for the event. Others will be addressed in Section 5. As the planning for the event proceeds, you will need to develop a capital budget and identify how the various items can be obtained. Some facilities will hopefully be available on site already. Others perhaps can be donated, borrowed or rented. In the end, it is inevitable that some capital assets will have to be purchased.

The budget should address how each item to be purchased is to be funded, and by whom if more than one organization is involved in hosting the festival.

Operational Budget

Similarly, an operational budget will be important, addressing all of the cost-related items to be covered. This will be dealt with shortly in Section 5. As with the capital budget, note who is to fund each item if there is more than one organization involved.

Revenues, sponsor contributions and fundraising proceeds need to be similarly budgeted.

Cash Flow Schedule

Both the capital budget and operational budget should be broken out into a schedule of when each purchase needs to take place and when revenues might be expected to be available to cover them.

Banking and Working Capital

It will be necessary to open one or more bank accounts for the festival, depending on how many organizations are involved. If possible, the partners and sponsors should contribute some funds for working capital purposes. It may also be necessary to arrange for a line of credit from a bank to supplement the available cash reserves. The cash flow schedule will be vital in determining how much you need available to you, and when. A significant additional reserve amount would be highly advisable, as the 'real world' is most certainly going to intervene in the best laid plans! Having access to a couple of credit cards would be helpful as well.

Tracking and Updates

As planning proceeds and the event nears, it will be important to regularly update the budgets to keep them realistic and to indicate any looming issues, such as potential shortfalls in cash.

4.3 Financial Control Systems

The basic systems needed by a festival are summarized below.

Financial Administration and Control

As with a business, the festival is going to need basic financial administration and control systems in place, as follows:

- Accounting – revenues, receivables, payables, disbursements, general ledger, income statement, balance sheet and cash flow statement
- Purchasing and approvals
- Inventory control
- Payroll
- Cash control and deposits

Gate Procedures and Monitoring

For gated admission festivals, a particular challenge is to control access to the grounds. Key considerations are summarized below:

- It is important to have a 'Box Office' Coordinator who is responsible for admissions and ticket control.
- You will need to set up systems for advance ticket sales; VIP tickets, complimentary tickets, discounted tickets.
- You will need to arrange other aspects, such as in and out privilege for visitors, a cash management system at the gate and equipment for debit and credit card purchases. There will need to be a system to manage visitors who have lost their tickets or their re-entry ticket.
- Recruiting honest people capable of dealing with the challenges, and providing detailed training is especially important in this part of the operation.
- Admissions have to work closely with security personnel to maintain overall security of the gate area. Concerns will be the movement of cash in and out of ticket booth(s) and procedures in case of a robbery attempt, procedures if a staff person or volunteer is suspected or caught stealing money or tickets.

4.4 Fundraising

To supplement the revenues available from the festival itself, festivals should pursue other sources of financial support for the festival. These will likely include:

- One or more community fundraising initiatives
- Various public sector sources at the local regional, provincial and federal levels

Community Fundraising

If you have been able to build a strong network of support within your community for the festival project, you should be able to mobilize this support toward fundraising efforts. There are many ideas for community fundraising, from the traditional bake sale and community supper to more ambitious programs such as auctions and prize draws.

When developing your community fundraising plans, remember that you can also target "in-kind" contributions as well as cash. There may well be local companies and individuals who are unable to donate cash but are able and willing to donate materials, supplies and services.

You should establish a separate fundraising committee, since it is often a major task in the planning for a community festival. Make sure you have a clear vision of what you are trying to accomplish. Keep the community informed as to how your efforts are progressing so as to maintain interest and profile for your project.

You may want to consider community fund-raising programs that give recognition to people donating significant amounts, such as a plaque program for corporate sponsors.

Membership programs can also be an excellent way to get the community involved in the festival early in the process, and help build a committed core of support.

Public Sector Sources

Public sector funding programs change frequently, with new programs added and changes made in program guidelines on a regular basis. Generally, there are only limited programs that are applicable to festivals. Your Regional Development Authority is probably the best place to go for updated information on the programs that might be available to your festival.

Generally, the following are potential sources of project funding and/or technical and planning assistance:

- Regional Development Authorities are located throughout Nova Scotia, and are a source of advice and technical assistance. In some areas they may also have the capacity to be a funding partner.

- The Nova Scotia Department of Tourism, Culture and Heritage has a number of programs that can potentially provide funding to festivals. Those in place in 2005 are identified below. Since these types of programs change on a regular basis, it is important that you check with the Department (both the Tourism Division and the Culture Division) or on their web site (www.gov.ns.ca/dtc/) for updated information.

  a) The Festival & Events Assistance Program (Tourism Division) can provide financial assistance towards marketing efforts for those festivals and events that are able to increase visitation to the province and/or the amount of time and money that tourists spend in Nova Scotia.

  b)The Grants to Organizations and Small Groups Program (Culture Division) may be able to provide funding for a festival, if the festival presents the work of professional artists (including music groups, dance troupes) or undertakes a project that engages the service of professional artists. Events that have been in existence for at least one year can submit a proposal for project funding.

c) The Cultural Activities Program (Culture Division) is yet another potential funding source for community based festivals with an arts component. The purpose of the Cultural Activities Program is to help build communities through community arts and cultural activities. Communities can include geographic locales, as well as communities of interest such as those involved in visual arts, music or crafts.

d) The Operating Assistance for Cultural Organizations program (Culture Division) provides operating assistance for cultural organizations. Support is provided to organizations which form a framework for the province's cultural sector, including those which produce a cultural product, own and or manage cultural facilities, provide service to the cultural sector and produce a cultural festival or event.

For all of funding programs available through the provincial government, there are specific eligibility requirements. Individual festivals and events should contact the appropriate Divisions to determine their eligibility for funding under each program.

- Canadian Heritage is a Federal department that provides funding for festivals through its Arts Presentation Canada (APC) Program www.canadianheritage.gc.ca/progs/pac-apc/index_e.cfm . (To qualify, festivals must be major events, be more than two days in duration, present professional artists from more than one province and have been operating for more than two years.

- Festivals that present music as part of their program are required to pay SOCAN (Society of Composers, Authors and Music Publishers of Canada) fees. They can, however, apply to the SOCAN foundation for funding. Visit the web site to learn more about their programs http://www.socanfoundation.ca/.

- The Canada Council, another federal agency, has programs that fund festivals. The Music Festival Programming Project program provides funding for organizations to do special programming projects. The Council can also provide tour and travel funding to artists to get to festivals. Their web site is http://www.canadacouncil.ca.

- Atlantic Canada Opportunities Agency. Although ACOA's focus is assisting private sector businesses, there have been some programs available that can provide support for community development initiatives that may include significant festivals and events.

- Human Resources and Skills Development Canada. HRSDC may be able to provide assistance with labour costs, such as hiring a coordinator;

- Local/regional municipality.

When approaching public sector departments/agencies for funding support, you will need to prepare a proposal that includes:

- Objectives and rationale for your project
- Description of the overall concept

- Identification of target markets
- Budgets and proposed sources of capital and operational funding
- Projection of operating revenues and costs, cash flow and working capital
- Organizational structure: who will take overall responsibility for the project, who are the partners and sponsors and their roles
- Proposed management and staffing plan
- Marketing plan
- Projected tourism and economic impacts

You will find that the government funding partners will expect you to come up with at least a portion of the total capital budget from non-public sources, either through corporate or community donations, or other fundraising initiatives. These contributions can include both cash and in-kind revenues, but some portion of it in cash is usually required.

4.5 Sponsorships

With increasing cutbacks in the availability of public sector funding, many community attractions and events are considering corporate sponsorship programs as a means of raising capital funds and providing ongoing support for the operation. However, there is strong competition for sponsorship dollars. Therefore, you will need to develop your sponsorship program carefully. Professional advice on this would be most valuable. The IFEA website has several templates on sponsorship issues which might be useful for you to review (www.ifea.com/resources/templates.asp).

Today, potential sponsors tend to evaluate their sponsorship in terms of who they reach, how many they reach, how often and how much they are likely to sell as a result of their sponsorship. To be successful in attracting sponsors, an organization must be realistic, creative and have a professional approach. Realistic in this context means having an understanding of what the true value of a specific sponsorship opportunity is to the targeted sponsor. Creative means that the organization must be able to match up sponsorship ideas and opportunities to sponsors who will see the most value in these opportunities. Professional approach refers to the need to develop and publish a sponsorship program and sales document that provides potential sponsors with the data and information they need to make an informed decision.

Before you approach potential sponsors, you need to do your homework. Have a clear idea, on paper and preferably with some preliminary design sketches of your concept, its scale and its budget. Identify your goals, objectives, strategies, markets and expected attendance. Build a case for their support. What is this particular sponsor going to get as benefits from providing support to your project?

You should consider having several different levels of sponsorship support, such as:

- Leadership Gift/Naming Opportunity: provides the sponsor with the right to name the event, like the Tim Horton's Brier, for example. The naming rights would be priced in relation to how much the particular element gets exposed in the media.
- Program Sponsorship: with donor recognition of a particular facility, such as a performance stage, or a display or program sponsored by one donor.
- Sponsor Plaques: with donor recognition provided on a series of plaques.

In addition to cash contributions from sponsors for capital or operating purposes, companies might also support the attraction through marketing sponsorships. This can take various forms:

- The sponsor includes the event in its own advertising
- The sponsor develops and pays for the festival's brochure and perhaps other collateral material
- The sponsor implements a promotional program for the festival, accompanied by its corporate logo.
- A sponsor provides in-kind radio, television or print advertising.

Attracting sponsorship, particularly from larger corporations, is a challenge and there are companies that specialize in helping organizations raise sponsorship dollars. If you believe there is an opportunity for significant sponsor support for your event, you may want to explore retaining some outside expertise to assist you.

The right volunteer leadership is critical in soliciting sponsor contributions – donors give more readily and generously when they are approached by their peers. You need to make sure that you have people assisting the festival organization with connections in the business community.

Here are some other tips on attracting and working with sponsors:

- The key is that sponsorship is an exchange ... they give you something and you give them something back.
- Sponsors at festivals are also looking for networking opportunities; a chance to meet other corporate leaders; an opportunity to meet the Mayor or other important government representatives; a perk for their suppliers or employees. Keep this in a VIP area or at a reception or dinner.
- Sponsors are looking for logo visibility, in media ads and especially on site, and they are looking for how many "hits" their logo will get. Banners on barricades or fencing, the sides of buildings, printed on tickets, on volunteer or staff t-shirts; on all signage ... these are all places that sponsors will want to see their logos.
- Ads in the Official Programme can be offered as a sponsor benefit.
- Sponsors will also be looking for free passes and VIP passes to the festival
- Some sponsors want the opportunity to speak on stage or introduce a performer; they want to be acknowledged and given an opportunity to speak at any press conferences or receptions (especially when there is media in attendance).
- In-kind donations can be just about anything the festival needs or uses, including services. The important thing to watch here is that sometimes companies will offer $5,000 worth of a product in order to leverage their sponsorship dollars and bump themselves to a higher sponsorship level. Make sure that whatever is being offered is something you need and will help with the bottom line.
- Sponsors are looking for that special item or programming element that will set them apart from other sponsors
- A beer or other beverage sponsor could be awarded "pouring rights" and then the festival would only serve a certain brand of their product.
- Sponsors could have a booth or information tent on site, or a product sampling area

Charity Status?

You will probably find that having your organization registered to accept charitable donations will have a big impact on your ability to raise money, both from corporate sponsors as well as from the general public. You will have to apply to Revenue Canada for charitable status, and meet all their requirements in this respect. Guidelines for charities were discussed earlier in Section 3.4 on regulatory, legal and tax issues.

4.6 Tourism and Community Partners

Beyond sponsorships, you may be able to establish partnerships with the tourism operators in your community who stand to benefit directly from the festival. While a tourism operator may also become a sponsor, they may be prepared to work with the festival organization on the following kinds of things:

- Developing and marketing packages with the festival as the central feature and the tourism operator's services added to it, e.g.; accommodations, local sightseeing or boat tours, dine-around events, shuttle services and so on.
- Marketing the packages and thereby, the event itself.
- Promoting the event to their own customers at their place of business.

As mentioned in Section 2, there may be opportunities to involve other community organizations in some of the tasks involved in staging the festival, perhaps providing volunteers to assist with different functions. Examples might include traffic and parking control, on-site displays and programming, visitor information services, and so on. Where money is involved, some of it might be shared in return for the assistance.

SECTION 5

Organizing and Operations

SECTION 5

ORGANIZING AND OPERATIONS

5.1 Board of Directors and Committees

You will want to establish a Board of Directors to direct and oversee the development and operation of your festival if your initial organizing committee is not to be the Board of Directors.

When seeking board members, organizations should seek out people who have senior management experience, financial oversight expertise and who have influence in the community.

Festivals are usually started by people with a passion for a type of music, art or a period in history. These people are usually community enthusiasts and attract like-thinkers to their vision. It is also important to invite people onto the Board and its committees who are not necessarily like the passionate visionaries, but rather bring the other kinds of expertise needed to make the festival a success.

Here are some other principles and tips to follow:

- Keep the Board small - 15 persons or less. Large boards are less effective and limit the active participation of individual members. For this reason, large boards discourage active people - who are the kind you want in the first place.

- Try to limit board membership to people who can make a real contribution to the success of the project. You want people with business savvy, marketing savvy, and others who have influence in the community, the "movers and shakers". The board should not be simply a place for political appointments or individuals seeking personal prestige.

- Make board members understand that, while they have the ultimate authority, the management needs to be given authority to manage. Boards shouldn't micro-manage operational matters! This is a common problem with community organizations and associations.

- The Board should focus its efforts on:

    - Setting policy, goals and objectives;
    - Approving business plans and budget proposals;
    - Considering and approving capital projects and other major expenditures;
    - Monitoring performance and holding festival management accountable for results;
    - Using the influence of its members to get funding, seek sponsors and represent the interests of the festival to the community.

- The Board should not:

- Interfere in operational matters under the authority of the festival management;
- Provide direction to staff other than the senior manager;
- Represent themselves individually as the voice of the enterprise (that's the role of the Board as a whole, or the senior manager)
- Publicly disagree with the management (disagreements should be dealt with around the Board table.)

It will also be important that boards establish an organizational structure and assign responsibilities such as signing authorities, responsibility for contracting, etc. You need to make sure that you have appropriate policies in place early on. Make sure the Board arranges Board of Directors Insurance to protect them from liability. Get legal advice on this.

Committees

Depending on the scope of the event, the Board may want to establish committees to provide more direction and oversight to the most critical areas, for example:

- Programming/Artistic
- Sponsorship
- Fundraising
- Marketing and Media Relations
- Financial Management
- Volunteer Development

5.2 Management and Staffing

Your event may have one or two staff and volunteers, or it may have hundreds of staff and thousands of volunteers. Some organizations are all volunteers. Several guiding principles for working with staff and volunteers are:

- People need to know what they are expected to do; and
- They need the tools to do the job.

The various areas requiring management and staff include:

General Management:

- Planning and budgeting
- Personnel
- Accreditation
- General administration and overall supervision of each area of operation

Site Operations:

- Site management and maintenance
- Logistics and general operations, including set-up and tear-down
- Signage
- Parking
- Security

Festival Operations:

- Regular programming
- Concerts or other specialty programming
- Artist/performer liaison
- Stage management
- Technical production for staged entertainment/events
- Concessions
- Volunteer management

Partnerships:

- Sponsorship
- Fundraising
- Partner liaison

***Promotion**:*

- Marketing and promotion
- Website
- Media relations
- Group sales
- Function reservations

***Guest services**:*

- Hospitality and visitor services
- Artist/performer hospitality
- VIP services

Finance and accounting:

- Box office/admissions
- Banking, cash control
- Accounting
- Management reports
- Payroll
- Purchasing
- Billing, collections and payments

At smaller events, many of these duties will be rolled into one or two people. At larger events, there may be a general manager, section managers, and staff as well as volunteers. It is definitely a better option to add more people later, than to start with a top-heavy organization that gets bogged down in its own structure.

Leadership

Strong leadership is an important element in successful festival development and operations. There is a lot that has to get done and lots of people need to be depended upon to perform, often with little or no pay. The leaders on the Board and in management need to be good at leadership! The following elements are very valuable in this regard:

- Vision – seeing what can be
- Passion – enthusiasm and drive in making it happen
- Inspiring – leading by example, competent and effective

- Authentic – saying it the way it is; no game-playing
- Courage – damn the torpedoes! Just do it!
- Affection – positive relationships with team members – building on their strengths, working around their weaknesses, allowing them the chance to prove themselves
- Challenge and Reward – providing clear objectives to team members, delegating authority and rewarding achievement
- Communication – coaching, encouraging, nurturing

Good leaders have a combination of most of these characteristics, along with a careful balance of self-esteem and humility. They are good at getting people to buy-into the vision and motivating them to help pursue it. They provide an environment in which the people they are leading are inspired to achieve what is expected of them. Their people do it because they want to do it.

Find these people and put them in charge! Oh, and make sure they have expertise to know what needs doing.

Training

A lot of festival training for staff and volunteers can be done through orientation sessions held on-site a few days before the event. Some areas will need more in-depth training (for example, security staff, and box office staff), and may have to occur over two or three sessions. Orientation sessions and training sessions are a great way for the staff and volunteers to meet key organizers, managers and the Board of Directors.

A festival manual is a good way to get everyone started with the same basic information. The kind of information that could be included would be:

- Overview and/or history of the festival
- A site plan
- A festival programme
- Rules and code of conduct (see below)
- Contact list
- Emergency plan
- Staff and volunteer job descriptions
- A separate document with specific policies and procedures for individual areas
- Meal provisions
- Parking for staff and volunteers
- Volunteer recognition party details
- Media relations policy

Everyone will need training on radio use and etiquette, and cell phone use.

You may have staff and volunteers that have come from other festivals and are extremely experienced. This is a great benefit to your festival, but make sure that they are also trained in and accepting of your particular festival's way of doing things.

Uniforms and Other Identifiers

Staff and volunteers need to have some sort of uniform or identifier to make it easier for them to work with visitors. The uniform can be a unique festival t-shirt, festival cap or it could be just their accreditation (name sticker or badge).

The identifier makes it clear to visitors where they can go for assistance. It is also an excellent way for staff and volunteers to feel they are a part of the big picture. Many people get involved with community festivals because of the sense of community and camaraderie that is inevitably created when a group of people work hard at a common goal.

Security staff need some way to uniquely identify themselves, perhaps with a different colour festival t-shirt (One that is easily recognizable when it gets dark). Some festivals will print SECURITY on the back of the t-shirts, others will go with a less conspicuous FESTIVAL STAFF label.

Code of Conduct

Whether you call them policies, guidelines or rules of conduct, you will need some form of written document that outlines the festival's expectations of behaviour from staff and volunteers. It makes it easier on everyone to have expectations clearly stated at the beginning. As well, you have something to fall back on in the event that you need to fire or discipline a staff member or volunteer.

Some 'rules of conduct' points to consider and tailor to your festival are detailed below:

Staff and volunteers will:

- Treat all festival-goers as welcomed guests and be as positive, respectful and helpful as possible.
- Wear your accreditation and uniform when on duty.
- Receive a meal ticket for each four hours worked.
- Be scheduled to work at least two shifts of at least four hours each before being granted free access to the festival site off-duty *(note: this would more be suited for a festival running for multiple days).*
- Have meals in the designated area for staff and volunteers when in uniform.
- Not wear your uniform and accreditation when visiting the festival site off-duty, and especially when drinking alcoholic beverages.
- Never drink alcoholic beverages on duty.
- Park in designated staff/volunteers area.
- Contact the general manager or designate in the case of any media enquiries; never give interviews or answer media questions ... Always politely refer them to the general manager.
- Never smoke in uniform.

It is clearly a fine balance between being too preachy and demanding, and simply outlining your expectations for the best behaviour from each person as befitting your festival goals and objectives. As with any human behaviour, it is much easier to loosen the rules once they are in place than it is to try to apply restrictions after the fact.

The Manual

It is a good idea to put all of the foregoing information in a master manual ('the bible'), with copies provided to each working group as a reference document. It would contain at least the following:

- All policies, procedures, working group roles and job descriptions.
- A critical path schedule for all tasks necessary from the planning stage up to the event itself, throughout the event and post event activities as well. In the festival business, success is in the details! Code each task as a 'must have' or 'want to have', with emphasis given to the former.
- All safety and emergency procedures to be followed.

Design it so it can also be used to record dates of completion of tasks, along with comments designed to assist planning for the next festival year. The IFEA web site has various resources that can assist you, including several templates under the General Production category in their template section (www.ifea.com/resources/templates.asp).

5.3 Site Development

When considering site planning and development, you will need to take into consideration a number of things – how the site "works" in terms of pedestrian flow and logistics, and how attractive and welcoming the site is to your visitors. For example, the stage may fit best in the far back corner of the building because of access to the loading dock, but if it leaves the entrance to the festival static and uninviting with little to entice visitors inside, then you have gained nothing. Striking the perfect balance takes planning and input from experienced sources.

Planning and Design

A rough hand-drawn sketch of the site may be sufficient for your festival or you may require a computer-generated drawing that is "to scale" and includes the location of every last tree and shrub. Whichever you choose, having something in writing avoids confusion and conversations that start with, "Oh, sorry, I thought you wanted that 24' tractor trailer placed directly in front of the stage. I'm sure that's what you said. We're looking' at overtime now."

If you are going to be selling beer or liquor, you will be required to provide a diagram or sketch of the location to the Alcohol and Gaming Authority with your application for a license.

Traffic Flow

This is discussed in more detail in the Operations and Logistics section to follow, but, simply put, you must keep in mind where people will walk (e.g.; between their place in the audience and the food concession), stand in line (e.g.; buying tickets, waiting for a washroom), congregate (e.g.; meeting place for a group). You will need to keep emergency access areas clear for vehicles, as well as a path through the audience for fire personnel or paramedics to access for medical emergencies.

Walking the site is a valuable exercise to see where there might be unusable areas and to check out the feasibility of your design plan.

Access for All

Making your site accessible for wheelchairs and physically challenged visitors can be as simple as adding a couple of ramps and a separate, easily-accessible viewing area. There may be an association in your community that could provide expert advice and resources to make your site as accessible and welcoming as possible.

Theming and Decoration

Site decoration and theming will make your festival site "come together", help beautify it and provide a complete sensory package to your visitors. Your site may be on a point of land that extends into the sea or a lake and the natural beauty will speak for itself, or you may hold a concert in a farmer's field that will need some extra effort.

Most festivals tend to decorate with a mish-mash of signage and hope for the best, as budget does not always extend to the "look" of the site. Some festivals negotiate with a sponsor to bring in shrubs and flowers, create walkways and rest areas, and add a waterfall or other landscaping elements. In some cases, theming the stage with backdrops, pots of flowers, and lighting is enough to set the tone. The IFEA web site (www.ifea.com/resources/templates.asp)has templates on signage and decorations that might be useful.

Signage

Directional signage will assist with pedestrian flow and comfort and can also be used as an important theming tool. With a little more coordination on your part, your signage can have a consistent and professional look that tells visitors they are part of something special and adds to their overall experience and impression.

The challenge with signage is that any concessionaire or retailer will already have their own signage that fits on their trailer or tent and will generally not want to spend additional funds to fit your image. It will be important to make the signage issue clear in your contractual agreement with them.

For a cohesive look at your event, you can plan your signage to reflect your theme or concept. For example, at a festival that is highlighting the seafaring history of a community, all the signage could be painted onto signs shaped like ships, or shaped like a captain's hat. It is really quite striking when a festival chooses, and sticks with, a consistent look. It does add a whole other dimension to your visitors' experience and highlights the sense of quality you are trying to convey.

5.4 Operations and Logistics

Operations and logistics involve everything that your visitor sees, touches or does on your site. The operations and logistics crew generally does their work behind-the-scenes, but the results of their work are very much in the forefront. People working in this area need to have the unique ability to plan out every detail beforehand and then react professionally and quickly when the plans get blown out of the water for some reason or other. The unexpected is the norm.

Entrance Gates and Ticketing

The entrance to your festival site must be appealing, welcoming, efficient and secure. The signage at the gates will serve to entice people to enter your site and inform them of prices, hours of operations, and programming. The entrance can be as simple as a table with a banner stapled to the front and a staff or volunteer welcoming visitors and collecting entrance fees, to a complex arrangement of a box office with multiple service windows, electronic ticketing system, and credit card and debit card capabilities.

Pedestrian traffic flow is one major concern around the entrance gates and ticketing area. Some people will only want information on what is going on and pricing and programming, others will simply want access.

Some things to keep in mind when planning your entrance gate:

- Where will line-ups form and will they affect vehicular traffic, block sidewalks, block driveways or entrances to businesses?
- Do you expect visitors arriving before the gates open? Where do they wait and line up?
- Make your entrance obvious enough that visitors will not walk onto your site without paying
- Allow adequate room for visitors exiting the site
- Ensure the area is suited to wheelchairs
- Adequate lighting is needed for evening/night-time operation

Traffic and Parking

The approach to your site and parking operations are the first impression many visitors will have of your festival. Your parking area needs to be well-marked and well-lighted and the parking attendants must be obviously identified. Visitors want to get parked and inside the festival grounds quickly. If parking staff are not perceived as being competent and in control, they will park wherever they see fit.

Parking operations falls into the category of one of those thankless jobs. Parking crews at large events are standing all the time, making change while directing vehicles to the proper area, convincing drivers that yes, you really do need them to park where you are pointing, and end up being the festival's frontline public relations team. They need to be exceptionally well-versed in what the parking plan is and how to deal effectively with situations that arise.

Some events use a local group such as a hockey association or Scout group, who raise money for their organization by asking for donations. This works well at smaller events, but it would be advisable to work with adult, and more experienced staff and volunteers for larger events. Communication in parking operations is key and radios are the best option.

Towing vehicles at a festival should be reserved for those blocking emergency vehicle access or bus lanes. It may be possible to simply tow the vehicle to a safer area rather than move them completely off the site.

Communications

At small festival sites communication is as simple and effective as finding the person you're looking for in the crowd and radios would be over-the-top and out of place. At larger, sprawling sites, or a festival with more than one site, radios are a very effective way to communicate.

Some festivals may use up to three channels or more, with security, parking operations, and general operations having separate channels. No matter the number of users, radios (walkie-talkies) will be most effective if all users are trained in proper radio-use etiquette.

Cell phones are great, but only if you have excellent reception in your area! Nothing worse than walking around saying, "Can you hear me now? How about now?" Don't assume everyone knows how to make calls, receive calls and recharge the batteries. Give every user a briefing on the phone's finer points.

At smaller events especially, communications can be treated fairly lightly and a strict etiquette and use of code numbers or other elaborate systems would seem excessive. The important thing to keep in mind is how emergencies will be managed. Does everyone know enough to use the communications devices effectively and successfully in case of a medical or other emergency?

Food Services and Concessions

Concessionaires who are used to festivals are generally fairly self-sufficient. They do usually need electricity … sometimes excessive amounts of it in the case of fryers, refrigerators and freezers. Conversely they may just need an extension cord for lighting. You will probably also need to involve the Department of Agriculture and Fisheries (Regarding food and washroom facilities), the Office of the Fire Marshal (Propane equipment, BBQs, exits from tents, etc.) and your local municipality, for inspections, approvals and permits.

Concessions will more than likely need vehicle access direct to their booth or tent each day to re-supply. Contracts with concessionaires should clearly outline access times and when vehicles are allowed and not allowed on site. You will also want to consider the following:

- Hours of concession operation
- Expectations of operating hours in case of bad weather (i.e. Is it up to the concessionaire to make the call to open or to close, or is it up to the festival management?)
- Accreditation and access (i.e. Will you give the concessionaire a set number of passes that they need to distribute and share amongst staff, or will you give them an unlimited number?)
- Set-up and tear-down schedule
- Fee and/or percentage agreement
- Type of product allowed (i.e. You may have a sponsorship agreement with a soft drink supplier; or, you may restrict the number of concessions selling a certain type of product, like ice cream or french fries)
- You may want to list the prices (i.e. to avoid concessions undercutting one another)

Again, the IFEA web site (www.ifea.com/resources/templates.asp) has several templates dealing with agreements and guidelines for working with vendors that might be useful to you.

Keep in mind pedestrian traffic flow to and from the concession area. Make sure that sight lines to the stage or pathways/sidewalks are not compromised by long lines to the concession booths.

Guest Services

Your Guest Services could consist of your staff and volunteers (readily identified by badges or t-shirts), walking the site ready to answer any questions. Additionally you can set up a booth or tent and provide a variety of services, including stroller or wheelchair rentals.

Festival Program

Everyone attending the festival will want to have a copy of the program of events. This is a listing of what is happening where and can include a map of the site. Glossy, full colour, and 20+ pages long may be tempting, but a photocopied sheet also may suffice.

Tourist Information

Your local tourism association or tourist bureau may supply your Guest Services with pamphlets or other material on local attractions, restaurants and accommodations. They may also request to have a booth on site to distribute information and answer questions.

Lost Children/First Aid/Lost and Found

Your Lost Children and First Aid services can be situated in the same area. When a child is brought to the Lost Children area, you should wait an appropriate amount of time and then announce the child's name and/or description over your public address system. In most cases the parent will come looking for the child as soon as they appear missing. It is critical that volunteers ensure that proper identification be required to pick up a lost child.

For First Aid services, there are organizations that will staff your event for free or for a nominal charge. Meeting with emergency service professionals (Fire Department or Police or Paramedics), will give you an idea of the requirements or their recommendations for First Aid care at your event. You may be advised to have an ambulance and paramedics on site during certain parts of your event.

Lost and Found could be included in this same area, or be located at the front gates or festival office. There are times when valuables are recovered, like wallets or digital cameras, and you will want a secure place to store them.

VIPs and Special Guests and Media

You may create a separate entrance and welcoming staff for your VIPs, as well as provide a priority parking area. Be clear on their invitation where they should go and provide a map of the site. Whether VIPs and media have a separate entrance or not, it would be a good idea to have a VIP package or media kit available when they identify themselves at the gate.

Group Hosting

Groups require some special considerations such as a coordinator responsible for:

- Communications with the group. (tours or schools or other groups)
- Welcoming them on site
- Selecting a meeting area for the group when they are meeting for a meal or leaving
- Facilitating expedited entry (for example, give out bracelets or tickets on the bus and bring the group through the gate as a whole)

- Having a festival programme or information distributed before the group arrives on site
- Parking for the bus or other vehicles associated with the group; and
- Drop-off and pick-up area.

Seniors groups especially will need adequate seating (preferably out of the sun or rain!), and possibly some complimentary refreshments like water and coffee.

Group Functions and Catering

Catering may be able to be arranged with concessions on site, or you may want to bring in a professional caterer for VIP events. Corporate groups may want to host a reception on your site, maybe even a dinner before the gates officially open if you are offering only evening programming. Caterers tend to be self-sufficient, but check with them ahead of time to make sure they don't need electrical hook-up or cold storage.

Staff/Volunteer/Entertainers Catering

There should be a separate area for staff and volunteers to rest and have meals. Some festivals work out a deal with concessionaires and staff and volunteers and entertainers can get their meals from the food booths. At other festivals, there is a separate BBQ or cooking area where this food is prepared.

Remember that if there is a separate area for food preparation, you will need a permit from the Department of Agriculture and Fisheries (Food Establishment Permit), Office of the Fire Marshal and, quite probably the local municipality.

Special Needs Customers

You will most likely not be able to cover every special need, but a willingness to accommodate people goes a long way. If, for example, you have a school for special needs in your community, you may want to take the initiative to check with them to see what would make their visit to the festival more enjoyable. Let them know you will do your best to make them feel welcome.

Easy access for wheelchairs and for visitors using canes or walkers should be a part of your plan, as well as providing accessible washrooms.

Site Management

Recycling is a key concern for events. The types of service offered and types of items accepted vary considerably from region to region. Although recycling is compulsory in most cases, event planners will need to research what is specifically available in their area and what the rules are. For example, what happens when the recycling material gets contaminated with other garbage? How must recyclables be bundled for pick-up? What are the region's policies for hazardous waste like empty propane tanks, paint cans etc.?

Site cleaning should happen on a continual basis throughout the day, with a thorough cleaning overnight. Emptying garbage cans before they overflow is especially important and keeps your grounds looking professional and welcoming. Washroom cleaning and re-supply are also key to a successful visitor experience.

Traffic Management – Vehicle and Pedestrian

When planning your site, keep in mind that people will want to drive as close as possible to the site, and pedestrians will aim to take the shortest route possible. Be realistic in planning your pathways and ask yourself what route do I want visitors to take versus the route they probably will take?

For vehicle traffic management, speak to the police, your town or city's traffic management department, the municipal bus service if applicable and other stakeholders to decide the best places for directional signage, and to discuss potential traffic issues and solutions.

5.5 Concessions

Every aspect of your festival is important and contributes to its success, but food is REALLY important. Everyone gets hungry and everyone wants quality food at a good price. Aside from being an important service to your visitors, food sales can also be a great revenue source.

Food & Beverage

In smaller community events, the food service is often provided by a local volunteer group who do all the purchasing, preparing, and selling. Proceeds will either go back to the festival or be split with the volunteer group. For events expecting large crowds, experienced food service operators are the best option for happy and satisfied visitors. These experienced concessionaires have the expertise and techniques for ordering supplies and preparing large quantities of food efficiently.

Attracting the Right Concessionaires

The type of food you sell depends on the vision and objectives of your festival and on your crowd expectations. "Fast food" such as hot dogs, fries, and candy floss are the most common foods found at a festival, but if your concept has environmentally-friendly overtones and is intent on presenting visitors with alternatives, you can opt for Indian, Chinese, Thai and other cultural dishes as well as fruit drinks and salads. Many festivals go for a mixture of both fast food and healthy alternatives. How receptive will your audience be to fast food? How receptive will they be to alternative options? In speaking with other festivals/events you will be able to determine what works best and which concessionaires are the most professional to deal with.

Retail

Visitors to festivals are often looking for souvenirs or a unique "find" and a few retail concessions add a lot to the general festive air of your event. Retailers at festivals tend to be local merchants or artisans and you can make a decision whether to only include one-of-a-kind and craft-type items, or to allow mass-produced products.

In your contract with the retailers, it would be wise to outline items, logos or themes that you will not accept on site. Examples include pornography, hate literature or slogans and or political messages.

Festival souvenirs are a great idea. Take into consideration the kind of crowd you are expecting and order accordingly. As an example, a silk scarf with the festival's logo would probably sell better at an art festival than a festival featuring heavy metal rock bands. The financial aspects of souvenir sales were discussed in the Revenue Generation section.

Contracts

Contracts with concessionaires need to include items such as opening hours, access to the site, and pricing. A more complete discussion of contract considerations was found in the Operations and Logistics section, and details on financial arrangements were in the Revenue Generation section. Check out the templates on the IFEA web site (www.ifea.com/resources/templates.asp) for some sample concession agreements for food vendors.

Regulations and Permits

Concessionaires are generally responsible for arranging for their own permits and approvals. Although concessionaires are ultimately responsible, it would be advisable to contact these various departments/agencies yourself and double-check to make sure that everything will be a "go" on opening day.

Retail operations (including the festival's souvenir sales) will most likely require a sales or vendor permit. Depending on your municipality, this could be a single event permit that covers all retailers on site, or the regulations may state that each retailer must apply for their own permit.

5.6 Equipment

Developing a comprehensive list of equipment required at your festival is imperative if you are looking to save money and save manpower and run an efficient event. Each area needs to determine their requirements and that information can be integrated into a master list. It is the responsibility of each area to create as complete a list as possible. You will not want to be scrambling for a back-drop or PA system the morning of your press conference!

This master list of equipment will help in researching suppliers and in negotiating rental contracts or in-kind sponsorship arrangements. It will also aid in establishing delivery and pick-up times before and after the festival.

Storage and warehousing issues also need to be addressed. Are there storage facilities on your site, or will you be able to place equipment as it comes in? Most likely, you will need some sort of storage, even if it is in a tent or under a tarp.

Types of Resources

Bleachers

Will you need to add bleachers to accommodate your audience? They may be able to be rented or borrowed from the municipality. Otherwise, they can be quite expensive to rent and transport.

Tents and Tent Floors

Tents could be needed for concessions, info booth, first aid area, storage, logistics headquarters, programming, and retail. Most tent rentals come with sides that can be closed over during rain or wind and at the end of each day. If your site could potentially become a swamp after rain or if the terrain is particularly uneven, you may want to consider putting flooring in the tents.

Toilets

A toilet rental company can give you good advice on how many portable toilets are needed for the expected size of your crowd. Make sure the maintenance schedule is adequate for your event. Scrambling to buy extra rolls of toilet paper and stocking the facilities is an unwelcome surprise duty!

Barricades and Fencing

You may be able to borrow barricades from your municipality, or, in some cases, from a local construction company. Metal barricades are generally used for surrounding your event site and for crowd control and the wooden-style barricades are most often used for parking operations or other cases where they need to be moved easily. Fencing can be rented for larger festivals and used for crowd control, and may be required by the Alcohol and Gaming Authority in order to get a permit to sell alcohol outdoors. They will restrict the licensed area to a tent or to a suitably enclosed area with minimum 4 ft fencing.

Tables and Chairs

If you think you have ordered enough tables and chairs, add another 25! Tables and chairs get swallowed up into the festival black hole and tend to get underestimated during the planning stage.

Risers and Staging

Risers are sturdy boxes (generally 12" high), that can be put together to form a small stage or used to create a raised seating area. Staging is more expensive and complex to construct, but may be needed depending on the size of your crowd and production requirements.

Electricity and Lighting

There could be enough power on site to supply your festival, or you may need to add to what's available by renting or borrowing generators. Generators can be noisy, and extra work will be needed to insulate them and dull the sound. Also, diesel generators must be maintained and the diesel replenished regularly.

Tools

Your logistics person could supply tools, for an extra fee as part of their contract, or the festival may choose to invest in buying tools that can be used each year. Small tools (hammers, pliers, staple guns, duct tape, cutters) are hard to keep track of. Whatever you buy or bring, know that you will need to re-supply at some point.

Vehicles

You can use personal vehicles or rent vehicles. For personal use, most events pay mileage or a flat fee. Sometimes rental vehicles can be provided through an in-kind sponsorship. Your festival may need everything from a three-quarter ton pick-up truck to cargo vans to small buses. Remember to have petty cash or a credit card system arranged for gas or other incidentals. If you are using the vehicles to pick performers up at the airport, you will probably want to run the vehicles through a car wash in advance!

Cell Phones/Radios

These are generally rented for the event. For radios, it is important to know whether you will just be using them on-site, or city-wide. The radios sold in department stores are fine for use at home or the cottage, but you will probably have more consistent success with a professional level product.

Reflective Vests

Reflective vests can be purchased by the festival, or possibly borrowed from the municipality or a local construction company. They are essential for the parking attendants.

Office Supplies and Equipment

This is discussed further in the Operations and Logistics section.

Trailers

Some sites will have enough indoor space for all your needs. Otherwise, you may need to have trailers to accommodate staff and volunteers. Some areas that could benefit from the use of a trailer include:

- Administration
- Logistics
- Volunteers
- Artist hospitality
- Production
- Ticketing
- Accounting
- Security
- General Manager.

Money-handling would be done in a separate area or secure trailer, although other areas could possibly share space.

Tents could be used in the place of trailers in some cases, but you would need to take into account security requirements, electronics, access to electricity, and communication lines.

Uniforms

It is a good idea to identify staff through a badge, t-shirt, ball cap or other easily identifiable item. Festivals rarely have actual uniforms and even the largest and most efficient and professional festivals have an air of informality about them.

Rent or Buy?

When discussing the merits of renting or buying equipment, keep in mind maintenance, storage, insurance, and replacement costs. Some items would be best to buy outright (small tools, reflective vests), but others are more cost effective to rent (tents, fencing).

One discussion that arises among festivals is buying equipment and then renting it out to other events. This is a great idea in theory, but it may not be when you take a realistic look at maintenance, storage, insurance (including liability insurance) and replacement costs. As well, there will have to be a staff person to coordinate the rentals, invoicing, payment, delivery and pick-up.

Sponsorships

Supplier sponsorships are invaluable to any festival, as long as what they are supplying is an item that you would normally spend money on (renting or buying). Once there is a master list established, it will be simpler for the sponsorship coordinator to negotiate contracts with sponsors, and may even be able to work out deals if no sponsorship is available.

Set-Up and Tear-Down

You will require anywhere from a week to a day before and after your festival for set-up and tear-down. Keep this in mind when booking your site dates. Set-up and tear-down always takes more time than you expect!

5.7 Programming

You will want to re-visit your vision, goals, and objectives when planning your programming. There are often various arguments to be made for certain types of programming and you and your Board of Directors will have to determine how strictly you will follow your objectives.

Daily Programming

Daily programming is your scheduled events that would be listed on a Festival Program, in the newspaper, or at the entrance gate. Your festival may be able to work with other events in the province or surrounding provinces in planning your programming. If there is a more well-known artist or band touring or interested in touring during the time of your festival, you may be able to book them by promising a series of three or four concerts within a short period of time.

This is where it pays to belong to regional, provincial, national, or international festival/event or tourism organizations. These organizations facilitate block bookings and provide a place to exchange ideas and leads on exciting performers.

There are various models for how programming gets done in the festival community. By far the most successful model involves the organization selecting an Artistic Director or Program Director who carries out the programming process. Another model involves setting up a programming committee that selects artists and creates the program. This model has more often than not resulted in problematic results. The best programs have a strong underlying vision and are well researched. This is much better done by a qualified programmer than an ad hoc committee.

Special Events

Special events serve to add value to your existing market, or to draw visitors to your festival who would not normally consider attending. These could include workshops and interactive sessions on: creative writing, singing folk music, making musical instruments, oil painting, making model tall ships, or any variety of topics related to your festival. Special events could also include the screening of a documentary, hosting a celebrated speaker or a "behind-the-scenes" tour.

If your festival, for example, is centered on an era in your town's history complete with costumed characters, activities and music, you may want to add a special event of hosting the Antiques Road Show (or your own version of the show with local dealers).

When your festival is more established, you may consider hosting concerts or other programming outside of your festival dates, say, a Christmas fundraising concert.

Off-Site Events

Some events have a main festival site as well as one or more satellite sites. In addition, there may be a concert presentation or art exhibit that would be better suited to an indoor venue elsewhere. You could choose to run that programming at the same time as the main site. That decision would be made taking into consideration your expected attendance and whether the off-site programming would add to the overall attendance or simply thin out the crowd on your main site.

Off-site events should either add value to your existing visitors, or attract a new audience.

Make sure you take off-site programming into account in your planning and that you have the staff, volunteers, communications system, and resources (ticketing, security, infrastructure) to manage it well!

School Programs

Your programming may fit well into the curriculum of your local schools (for example, highlighting a culture, the area's local history, or a type of music). Some festivals have assisted in creating teacher's aids, and then have a school initiative where bus loads of students are brought on site for special programming.

This could be done as a way for the festival to contribute to the community, or it could be a source of revenue from the students' attendance.

5.8 Show Management and Production

Smaller community festivals will need a stage coordinator who does everything from ushering performers on and off the performance area to moving chairs and microphones and running the CD player. The more well-known artists you book, generally the more complex the arrangements. Most local acts will be satisfied with bottled water and a meal provided, while, on the other hand, stories about "20 boxes of Smarties with all the red ones taken out" are not that far-fetched.

Contracting

Your contracts with performers can be as simple as a letter of agreement that states what the performance times are, the type of performance, and how much they are getting paid and when they are getting paid. Several examples of contracts are provided on the IFEA web site (www.ifea.com/resources/templates.asp).

As you move up the scale in terms of 'not-known' to 'well-known', the contracts and agreements can get more and more specific and demanding. There are technical riders (Specific requirements on the type of equipment or musical instruments, the exact stage set-up for chairs and equipment, sound requirements etc.), and hospitality riders (requirements for food and drink, accommodation and transportation), that can get as specific as "one litre Tropicana orange juice with no pulp, one case of diet coke with caffeine, a fruit tray with seedless green grapes, watermelon, strawberries, and granny smith apples; ground transportation by black limousine).

All artists, whether amateur or celebrity, can run the gamut from being completely flexible and accommodating, to being demanding and difficult. A calm and respectful attitude in your stage staff goes a long way to successfully handling almost any situation.

Having a production manager, and/or staff and volunteers who have direct festival experience would be a great benefit to your event. Outdoor venues are much more complex than events held indoors. They can bring unexpected situations such as 70-mile/hour winds and a thunderstorm and ruined sound boards. Even a small, one-day event would probably best be served by staff who have dealt with adverse weather and other on-site crises.

Staging

There are many different types of stages. These range from 12" risers placed together to form an adequate surface area, to a space on the grass, to a 5' high stage that unfolds from the back of a tractor trailer to a stage that is built piece by piece over a period of days.

Too small a stage for your crowd and your audience will be complaining about not being able to see everything. Too large a stage and your acts will look lost and your audience will be complaining that everything is too far away! A little common sense, a few chats with other festivals, and an honest look at your budget will give you an indication of what is best for your event.

Backstage Security

Again, depending on your performers, backstage security will either be a non-issue with artists and visitors mingling about, or it will be a tightly-controlled secure area with only those having a certain level of accreditation permitted.

Celebrities have a reasonable expectation of privacy before their show and may have legitimate worries for their safety. Unfortunately, other performers will demand the utmost security and privacy for no other reason than they can, or feel they can.

You will know from your consultations with police whether you have any unusual safety and security issues and can take appropriate precautions.

Rehearsals and Noise Level

When meeting with local residents and other stakeholders, keep in mind that, aside from your scheduled programming times, some shows may need sound checks and rehearsals. These can be as loud as the event and can be quite jarring. Make sure that your by-laws allow for the appropriate level of noise during sound checks (normally occur in the late morning or afternoon), and that you inform police and other stakeholders (City Hall switchboard or municipal councillors), in case of complaints.

If you need to apply for a noise by-law exemption then it is in your best interest and public relations with the community to conform to that time limit to the minute. This allows a certain decibel of music past the normal hours for noise. Residents will tolerate excessive noise as long as they know about it ahead of time and it ends when it's supposed to.

Artist Hospitality

Your performers will appreciate some form of hospitality, from meals to accommodation. The sponsorship coordinator may be able to negotiate hotel or motel rooms or they may need to be factored into your expenses. For meals, you could possibly have the concessionaires provide these under their contractual agreements.

Some festivals will have staff and volunteers specifically assigned to artist hospitality. Their duties might include:

- Transportation from the airport, to and from hotels for sound checks and show, and return to the airport
- Provide refreshments and snacks in the artist trailer, tent or "green room"
- Fetch the performer for sound checks and show time
- Arrange meals
- Deliver welcome packages to hotel rooms

Essentially, whether you are supplying bottles of water and pizza or gourmet catering, performers just want to feel as comfortable as possible while providing your visitors with what they came for … great entertainment!

Production Schedule

For more involved shows, a production schedule is essential for anyone involved in the technical production. This usually details all production related activities from early morning to late night. It becomes your bible, so to speak, of who should be where and when and what should be happening.

Production schedules are also very important for paid staff as many technical crews are part of a union that takes care of its employees by not allowing excessive hours without meal breaks. For some larger shows, even a half hour delay can throw a schedule off and end up blowing a budget because of overtime.

5.9 Volunteers

Volunteers are essential to so many organizations, causes, and events. Community festivals are no exception. Your festival will need anywhere from two to a thousand volunteers and a similar scenario will be used no matter how many volunteers you require. You will have to recruit, train, manage and thank them.

Before you start you should identify what areas will need volunteers, how many people are required, create job descriptions and list the skills and abilities needed for each position.

You also need to work hard at identifying what benefits your volunteers can get out of working with your festival/event – with the competition for volunteers, you need to offer potential volunteers more than just a t-short or a pass to the festival. Matching the skills and interests of the volunteers available to you with the tasks that need to be accomplished can go a long way towards attracting the interest of potential volunteers, and to keeping them motivated and involved.

There are numerous resources available on working with volunteers. Check out www.volunteertoday.com for a wide variety of hints and resources addressing a full range of topics and issues dealing with volunteers.

Recruitment and Screening

Many festivals use community resources such as press releases to newspapers, television and radio, along with flyers or posters at arenas or recreation centres. You can also approach:

- Service clubs
- Sports associations
- Girl Guides and Scouts Canada
- Air, sea or army cadets
- High schools, community colleges, or universities
- Parent associations
- Tourism associations
- Church groups
- Seniors' homes
- Corporations or government (social or sports groups within these organizations)
- Municipal employees
- Volunteer bureau
- Contact other events for their volunteer list

Identify some of the key benefits of volunteering for your festival/event and promote these benefits in your efforts to attract volunteers. They might include such things as the opportunity to:

- Build capacity and knowledge
- Strengthen their leadership skills
- Meet people and have fun
- Build networks and contacts

It would be valuable to involve volunteers who have worked with you before to help in designing and implementing the recruiting efforts, in articulating the benefits to be gained and in recruiting new volunteers.

Interview prospective volunteers in order to ascertain their skills, abilities, and interest level. Individuals volunteer for a wide variety of reasons, such as:

- It is a requirement for school or other organization
- They want to improve their skills
- They want to meet potential employers
- To add to their resume
- To keep busy while unemployed
- They are looking for social interaction

- They desire to contribute to the community
- To be a community partner
- To get into the concerts or other programming free.

Some festivals will screen volunteers through the police for a history of theft or other convictions that may compromise the integrity of the festival and put staff, other volunteers or visitors at risk. Check with your local law enforcement agency to ascertain whether this step is feasible or advisable for your event.

Orientation and Training

A Volunteer Handbook is an excellent way to convey your vision, objectives, and expectations and to serve as a resource for your volunteers. The handbook could include much of what is in this manual relating to the management of staff and volunteers. Each volunteer should also have a job description (however brief) so that they have a clear idea of what is expected of them.

An orientation is a good idea. Your orientation session could start out with all the volunteers attending a general briefing and site tour for the first half, and then a specific training with their section leaders for the second half. Remember to take this opportunity to relay to the volunteers how important they are to the success of the festival and how much their time and energy is appreciated.

Although the orientation and training session can seem like a "necessary evil", taking up your time so close to the event, it is essential to train volunteers as completely as possible and avoid rushed explanations the day of the festival.

Management

Having volunteers working shifts is much like employing paid personnel. They need to be given the same level of care and support, if not more so. Volunteers will need to know who to go to for information and assistance, where to find the tools and resources they need and will need to know how they are doing. They will want to feel "in the loop" and part of the process.

Although a formal performance evaluation is not required, some form of feedback is beneficial. It lets a volunteer know if they should be doing more of the same or completely changing the way they are performing a task. Some volunteers may need a written evaluation for their school or organization. It is always wise to go over the evaluation form with them beforehand and then both of you could take notes during the event.

Safety and Liability

Make sure you are following all Occupational Health & Safety regulations to protect yourself and your volunteers. For example, some regulations state that while a stage is being erected, the site is considered a construction zone and everyone must wear safety boots and a hard hat. Check into the rules and regulations well before your first set-up day to avoid expensive, and possibly time consuming surprises.

Your volunteers should also be well-trained in your risk management procedures and have clearly set out steps to follow in case of problems.

Volunteer Hospitality

Some festivals will provide a separate area for volunteers to check-in, take breaks and have meals. It gives volunteers an opportunity to mingle, share information and rest in relative peace and quiet.

You will need to establish the procedure for volunteer meals, whether concessions will provide the refreshments or you operate a BBQ or some other foodservice specifically for volunteers and staff. Further discussion on this subject, as well as on identifiers such as t-shirts, can be found in the Management and Staff section.

Recognition

It is important to thank volunteers along the way. The staff and the Board of Directors should make a point of verbally thanking volunteers they meet or work a shift with. Also the volunteers could be thanked as a group each day over the PA system.

Most people simply want to feel that they are valued, and each person's sense of value comes in many guises. It could come in the form of verbal appreciation, free parking on-site, free meals, complimentary admission for friends and family, unlimited access to the festival outside of their volunteer hours, a festival pin or other memorabilia or a festival t-shirt. If your community festival has a small number of volunteers, then perhaps you can afford to personalize the gift or recognition and tailor it to the individual.

A volunteer recognition wrap-up party complete with thank you certificate or plaque is a great way to complete their experience. Singling out certain volunteers for their outstanding work can either motivate or deflate your volunteers. This is because everyone's efforts made your event a success. It is advisable to take care in how you word any specialized awards or gifts.

It would be valuable to meet with key volunteers after the end of the festival and get their input as to how things went, problems that need to be addressed in the future and to explore their potential role in next year's festival. This will help ensure that they feel part of the team and will encourage their return next year. You can also explore their interest in becoming involved in different aspects of the festival/event so as to maximize the appeal to them and reduce the potential for burnout.

For the following year, an invitation by letter to join the festival sent early in the planning stages is a nice touch and sets the tone of appreciation and welcoming volunteers back.

SECTION 6

If Something Can Go Wrong.....

SECTION 6

IF SOMETHING CAN GO WRONG.....

This section addresses problems that might arise and what you need to do to deal with them. In large part this involves having a plan for different contingencies and, where necessary, arrangements with outside agencies for assistance when required. Contingency planning is the first step and it should address all of the potential problems that might arise. There should also be a 'risk management' plan in place along with insurance and compliance with the legal requirements that were discussed earlier. Finally, there needs to be prior arrangements in place to deal with emergencies.

6.1 Contingency Planning

Murphy's Law states 'If it can go wrong, it will go wrong'. While that may not always be true, it often is true. The best Murphy insurance is contingency planning; having a solution at hand for each reasonably likely problem that might arise. Contingency planning is vital for a festival.

The kinds of problems commonly encountered at festivals, and what you can or need to arrange to be able to deal with them include the following:

Bad weather

- Tents for programmed events
- Alternate venues for outdoor programs
- Rain day passes for attendees to return for a rescheduled performance

Power failure

- Backup power source installed
- Emergency generator(s) on site or on call

Equipment failure

- Standby equipment
- Spares
- Rentals on site or on call

Robbery, Vandalism

- Police in close contact

Entertainer cancellations/no-shows

- Backup entertainment/program
- Rain day passes

Staff absences, volunteer no-shows

- Call-in backup staff
- Multi-task training

Some problems could be of an emergency nature and require more extensive arrangements. These include:

Fire

- Fire extinguishers
- Emergency communications
- Fire engine access
- Evacuation plan

Illness, injury

- Paramedics/First aid on hand
- Emergency communications
- Ambulance access

Unruly behaviour, drunkenness

- Security personnel
- Emergency communications with police
- Holding area

Traffic problems

- Security personnel
- Parking personnel
- Police

Unauthorized entry

- Gate/access control
- Fencing, perimeter control
- Security personnel

The following two subsections provide more information on emergency-related matters.

6.2 Risk Management and Insurance

Risk Management

In today's insurance environment, relying exclusively on insurance to cover the risks potentially associated with operating your festival is not viable. You need to have a process in place to identify and address the risks that are faced by the festival or event. The IFEA web site (www.ifea.com) offers some resources and suggestions on risk management issues. Another website with considerable information on this topic is www.ourcommunity.com.au and follow the links to the insurance and risk management centre.

Risk management is a strategic process that will improve your ability to identify, analyse, control and, if required, deal with (i.e. through insurance coverage) risks that are associated with your operation. It is a commitment to high standards of care with respect to the health and safety of your guests/visitors and your employees. Having a well thought out risk management process and procedures may also assist you in obtaining insurance; in fact, it may well be a requirement for your insurance coverage.

You need to be pro-active in risk management, and to keep well documented records of the risk management process you follow. It is a good idea to have a series of checklists dealing with every aspect of your risk management process, including risks you have identified, their evaluation and prioritization, how you plan to deal with them and your response/contingency plans. An introduction to some of the issues and processes around risk management is provided below.

Categories and Sources of Risk

There are several broad categories of risk that you should consider when preparing your risk management plan. These include:

- **Safety** – such as physical harm, violence, sanitation or health risks
- **Security** – the physical security of your visitors, staff and volunteers; the security of your intellectual property; the security of your property and equipment and risks associated with them such as property damage, theft, fire, etc.
- **Capability** – including the procedures, and such things as setting unrealistic goals or projections
- **Internal** – resource allocation (e.g. staff), changing priorities
- **External** – legal, labour, weather, regulations, competition

Risk can be created as a result of one or more of the following:

- Poor planning
- Unsafe physical conditions
- Natural events such as storms, floods,
- Inadequate safety measures
- Inadequate management
- Human behaviour
- Relationships with suppliers and contracts that are not clearly defined and agreed to

The Risk Management Process

It is generally accepted that the risk management process involves a series of steps which enable an organization to systematically identify and prioritize the risks that exist and take action to prevent or reduce them. A critical part of the risk management process is to have a well-thought out, detailed plan to deal with what might happen. Following these steps means you will be less likely to overlook the risks that exist and that you will be ready to respond to any problems that arise.

The risk management process is summarized below:

Step 1: Risk Identification

The first task is to identify all the risks that might potentially exist for your festival/event. This can be done through a combination of:

- Reviewing historical material on the festival/event

- Reviewing written material such as contracts, relationships with suppliers and sponsors, program details, etc.
- Meeting/brainstorming with staff, suppliers, contractors, emergency personnel, etc. Depending on the scope and nature of your festival/event, you may want to bring in a risk management specialist to help you identify the risks your festival/event is facing.
- Survey your festival/event site, several times – in the early planning stages, before the event and during the event. This requires a careful walk through and consideration of all potential risks. Examples of things to watch out for might include:
    - Unprotected tent stakes and ropes
    - Objects protruding into walkways
    - Unsecured electrical cables or boxes
    - Deteriorated seating areas or loose handrails
    - Poorly lighted areas
    - Poorly marked entrance/exit areas

The objective in this first step is to identify what might happen, and what the implications might be if it does happen. Don't forget that the risks are not just physical or safety risks. They could also relate to promises you have made, such as promising a sponsor a certain level of attendance that does not materialize.

Step 2: Evaluate and Prioritize the Risks

For each of the risks you have identified, you need to assess the likelihood of each occurring as well as the potential impacts and the severity of these impacts. Those that are more likely to occur and have the most significant consequences should be given the greatest attention in your planning. Your prioritization should consider the potential impacts on your visitors, staff, volunteers and performers, as well as the potential impact on the festival/event and the resources of the event.

Step 3: Implement Risk Management Techniques

You need to develop and implement plans to control each risk to the extent possible. The objective is to achieve one of the following, with a) being the preferred choice if at all possible.

a) Eliminate the risk or the potential of it occurring – **AVOIDANCE**
b) Reduce the consequences – **MITIGATION**
c) Develop response and contingency plans to deal with the risk if something does go wrong – **ACCEPTANCE**, or
d) Transfer the risk to some other group – a supplier, emergency services, etc. – **TRANSFERENCE**

Step 4: Review, Monitor and Modify

Your risk management process is an ongoing one – it needs to be regularly reviewed and monitored, and updated and modified as required.

Response and Contingency Plans

It is unlikely that you will be able to eliminate all of the risks that might potentially occur as a result of your festival/event so you will need to have response and contingency plans in place to follow when things do go wrong. Some points to consider in developing these plans include:

- Communications are critical to the successful implementation of contingency plans. Festival staff and volunteers need to know who the specific individual is that makes the decision to implement a contingency plan, how that decision will be communicated to them (staff and volunteers) and to your visitors, if necessary. Plans need to be in place for communicating with emergency services personnel and for communicating within the festival staff/volunteers.

- There must be a clear understanding of the procedures to be followed. Your festival/event should have a list of potential responses for dealing with each eventuality, and a clear understanding of what would trigger each response as well as the specific actions to be taken, by whom. Roles and responsibilities need to be clearly documented.

You will definitely need to have a plan to provide emergency medical attention. It might include having designated staff/volunteers with advanced first aid training on site and accessible at all times, and/or arranging for St. John's Ambulance to provide on-site service. You will also need an evacuation plan to be used in the event of a fire, bad weather or bomb threat.

Insurance

All festival operators should carry insurance, regardless of the size of the festival and you may well be required to carry insurance in order to obtain some permits and licenses. If you are a small community festival, you may be covered under the insurance coverage of the parent/community organization or, potentially, the municipality. Alternatively you may be able to arrange for coverage through the municipality's policy if you are using their facilities.

The main types of insurance you will want are:

- General Liability Insurance is insurance to cover claims made against your festival for bodily injury or property damage arising from your operations. This insurance is commonly known as third-person liability insurance. Liability insurance will protect you from any accidents which may occur during your festival.

- Director's and Officer's Liability is important to a not-for-profit organization with a board of directors. This type of insurance covers directors for wrongful acts such as wrongful dismissal, errors and omissions in the course of performing their duties while acting as a director/office of the association. While Nova Scotia's Volunteer Protection Act does provide volunteers with some protection, you may find that your Board members are much more comfortable if you carry this type of insurance.

Depending on the scope/scale of your festival, you may also want to consider:

- Equipment Coverage - insurance to protect the equipment of your festival, including maintenance equipment, restaurant equipment if you operate a restaurant or canteen within the attraction, etc.

- Crime Coverage - a type of insurance which protects your business from losses resulting from employee infidelity or theft. This type of coverage can be particularly important if you are operating food establishments or gift shops where theft of money or items can sometimes occur.

- Robbery and Hold-up Protection will cover you in the event of a robbery. This type of insurance can be particularly important if you are likely to have a significant amount of cash on hand at any time.

The specific types of insurance you should hold will vary according to a variety of factors, including the size and nature of your festival. You should seek advice from an insurance broker as to the specific requirements and needs for your festival.

In most cases, you should purchase broad-form or all-risk insurance which will provide you and your business with a number of different coverage types, rather than purchase standard or basic insurance. Basic insurance typically only provides you with fire protection insurance and, in some cases, limited liability insurance.

6.3 Security, Emergencies and First Aid

The discussion to follow expands on health, safety and security issues. The IFEA web site, templates section (www.ifea.com/resources/templates.asp) provides some templates addressing crisis and emergency plans.

Emergency Services – Safety and Security

It is not an easy thing to plan for the worst when you're concentrating on planning for the best! But it's important.

We suggest you create a safety and security sub-committee or task force that includes representatives from emergency response organizations in your community. Representatives could include:

- Local police detachment
- Fire department
- Paramedics
- By-law enforcement
- Nova Scotia Alcohol and Gaming Authority if you are serving alcohol
- You own security people and/or other officials responsible for the site you will be using

The most important objective here is that everyone has the same basic information in the event of an emergency. Issues to be addressed include site locations of concern, hours of operation, expected crowd sizes, expected problems or concerns, etc. An important part of their role is the development of a site grid and plan for emergency response and access, which is discussed below.

Once you have shared the general information about your festival and created a plan for dealing with emergencies, your safety and security sub-committee may decide that they don't need to meet again. That will depend on the complexity of your event and level of perceived risk.

Emergency Plan

Development of a plan to deal with emergencies is critical – accident, evacuation, fire, medical emergency, site grid, access/egress are all factors needing consideration.

An evacuation and emergency plan sounds like a complicated and scary thing! But it can actually be as simple as everyone involved in emergency services in your community knowing how to access the festival site on foot or by vehicle in case of emergency. It can also be quite a detailed undertaking; it really depends on the location of your event and the kind of crowd you expect. An event that is guaranteed to attract biker gangs is going to take a different level of planning than one that is aimed at attracting families.

One helpful idea is to take your site plan and draw a grid on it; similar to a map. You put letters across the top and numbers down the side. Once this site plan is distributed to your safety and security staff and your other staff and volunteers, it makes it incredibly simple and accurate to describe where help is needed when a problem arises.

Contact Information

A contact list with cell phone numbers or emergency numbers should be distributed to staff, volunteers and your Safety and Security Committee members. A larger list with all contacts will be useful, but a smaller list with key contacts could be taped to radios or cell phones as well. The key contact list should include emergency service numbers as well as those of key staff and volunteers

Crisis Communications

Once you have established the key contact list, make sure staff and volunteers are clear on whom they are to call in case of an emergency or crisis.

Train staff and volunteers on the use of radios and/or cell phones. Most of us in our day-to-day life have no call to use a radio. They are toy-like and invite all kinds of banter and horsing around, which needs to be discouraged. Establish operating procedures (how to use a radio - do's and don'ts on air), and encourage everyone to follow them. Remember, you never know who the various people having radios are standing next to!

For media communications associated with an emergency, a bit of media savvy can save a lot of heartache later on! Some of the things that are important in this regard are as follows:

- Prepare and issue a statement as to known facts and what is being done to handle the situation.
- To the extent possible, script responses to expected questions from the media.
- Don't speculate about what has happened. If the facts are not known or unclear, say that relevant information will be forthcoming when available.
- Many media people will attempt to force you to provide 'breaking news' of an event in progress, the more sensational the better. They will ask provocative questions in an attempt to elicit such a response. Don't answer the question as asked; respond by repeating the relevant facts in your prepared statement. Don't 'shoot from the hip'; only answer questions within the scope of your prepared statement and your prepared responses. Others should receive a 'no comment' response.
- Never try to outwit the media in a verbal contest. You will lose every time, either by saying something you shouldn't or giving them an opportunity to report your statement out of context. Both are disasters.
- Terminate the interview once the foregoing process concludes, with a statement as to how further communications will be handled.

Assign and train specific people to speak with the media in such instances. Educate your staff and volunteers as to why this system is in place and the people they are to refer media queries to.

Crowd Management

It helps if you have past data that allows you to predict the kind of audience you are going to attract, the approximate numbers of people that are expected to attend as well as the periods of peak activity. This will allow you to plan for pedestrian traffic flows (Entry and exit, walkway and queuing area capacities) as well as the capacities required for programmed events at different venues (Seating/standing areas, number of security and service personnel).

Are you serving alcohol? If yes, then more security personnel are required, particularly for evening performances.

What ages are you expecting? Youth are generally more of a challenge.

Are you expecting any 'problem' crowds? Problem crowds don't necessarily mean those drinking heavily and looking for a fight. Your problem crowd could be any group of which there are too many people competing for access and seating. 500 senior citizens trying to cram into a space for 200 will most definitely be a problem.

Once you have a site plan on paper, walk your festival site and see how the crowd flow will work. Is there a conflict between your entrance gate and access to toilets? Do visitors exiting have to cross in front of the stage when the audience area fills up? Are there enough exits for when the event is over? What if people start lining up before your gates are open? If there is a line-up at the food concessions, will they block sight lines for the stage?

Good directional signage is important. It should clearly guide people to the locations of toilets, food concessions, beverage concessions, shops, first aid, visitor services, etc.

First Aid and Paramedics

It is generally the responsibility of the event organizer to provide certified first-aid service for the duration of the festival. This on-site service can be provided by the St. John's Ambulance or perhaps other organizations.

First aid organizations normally cannot transport patients to a hospital. That is done by emergency medical services, such as paramedics, specified ambulance companies, police or firemen. Working out a communications and response plan with your local emergency services organizations is essential.

There may be some occasions where you would want to ensure paramedics with an ambulance are stationed on-site. There may be a charge for that service.

Security Staff

Some events require a minimal security staff such as a force of all volunteers with a staff person as Security Coordinator. Other events will require a Security Coordinator along with paid security personnel to handle the more demanding aspects and volunteers to assist them and deal with the more routine duties.

A calm, positive attitude and professional conduct of security personnel are key elements to the successful outcome of most situations. Security staff can directly influence the escalation or de-escalation of emotions. Poor handling can turn a minor problem, such as a visitor insisting that they 'forgot' their pass and demanding access, into a major concern. And the reverse is true; a rowdy group can be calmed with a positive but firm approach – all the time remaining calm and exercising restraint. Security personnel need to accept that all visitors are customers and should be treated accordingly, and in a courteous and respectful manner.

In choosing your security staff, keep these attributes in mind. Also, training of security staff should include these elements - along with a clear definition of roles, communications procedures during normal day-to-day operations of the festival, as well as communications during a crisis situation.

Accreditation – Who Goes Where

Accreditation involves authorizing different categories of people to access different parts of the site. There needs to be an easy-to-understand system of controlling who goes where on a festival site. Accredited people, properly identified by uniform can also provide visitors with access to the right people to give them information or directions.

Although accreditation could be perceived as being required only at fancy, big-city events, this isn't so. Every event needs something in this regard. Its complexity or simplicity can vary depending on the level of need for security and control.

In assessing the need for an accreditation system, the organizing committee should ask: Do we care if everyone has access to everywhere? Are there sensitive documents or valuables or money that will be handled and/or kept on site? Will the artists expect a 'closed' backstage and waiting area? Are festival personnel-only spaces important; if so, where and when?

Ease of recognition for the different categories of accredited staff and volunteers is a key factor, and particularly for those intended to be accessible to visitors. The colour of the badges is also a key consideration, especially if your event runs into the night-time. Even in daylight, a system that includes distinctly different badges is much more effective.

All staff need to be clear on how to deal with someone suspected of not having appropriate accreditation.

SECTION 7

Marketing the Festival

SECTION 7

MARKETING THE FESTIVAL

Most festival organizations don't have a significant marketing budget. While the Calgary Stampede might be able to support a high-powered promotional program, that is not the case for 99% of the other festivals in Canada, and those in Nova Scotia in particular. Having a well-designed promotional program on the other hand can be very effective in generating visitation and revenues. It also helps in attracting partners and sponsors. So what level of budget is right for your event?

In most cases, the answer to maximizing a limited budget is to lever your opportunities for getting others to assist you in marketing the event; such as:

- Your sponsors
- Your community organization partners – service clubs, the municipal government and its parks and recreation department
- Your packaging partners
- Your tourism partners in the area
- Tour operators you work with
- Your local and regional tourism marketing organizations
- The Department of Tourism, Culture and Heritage through their festival and event marketing initiatives
- Your local, regional and provincial visitor information centres
- Your local media
- Provincial media, including Halifax media (and, depending on the scale of the festival/event, potentially national media as well)
- Travel trade media

Some of these partners and stakeholders will help promote the event because:

- They benefit from the business it will bring them
- They are in the business of promoting your community and region; others in the media because it is newsworthy; and others because they think it's good for the community and they want to be part of it.

In this section we first review the various promotional techniques that can be effective for your festival. We also comment on those that might potentially be undertaken or funded, in whole or in part, by sponsors and/or partners. This information is provided in italics. You may also want to review the Marketing for Your Tourism Business Guide that is part of this series, or the Guide to Starting and Operating a Commercial or Community Attraction, for additional detailed information.

7.1 The Marketing Plan

We strongly recommend that you develop a plan for how the festival is to be marketed, and particularly how you intend to engage others in the effort on your behalf. The marketing plan should address the following:

1. An assessment of the marketplace situation:
    a. The available markets for the festival,
    b. The markets you can reach through working with your partners and sponsors,
    c. The competition, if any, at the time of the event

2. Your objectives:
    a. The priority target markets,
    b. The levels of visitation and revenues desired,
    c. Other objectives for the event

3. Your marketing strategy:
    a. How you are going to reach each of the priority target markets – the various marketing tactics you intend to employ. Which marketing programs offered by the Department of Tourism, Culture and Heritage and your local and regional destination marketing organization do you intend to participate in?
    b. How you are going to 'position' the event to attract their interest. Positioning involves a statement as to the key and unique features of the event, who it is designed for and how it is different from other events.
    c. Your partners and sponsors and how you intend to work with them in marketing the event.

4. The action plan, budget and tracking:
    a. Specific marketing initiatives – the media, the message, the schedule
    b. Budgets by target market and marketing initiative, and the formulae for cost sharing with partners and sponsors
    c. Tracking methods to measure the effectiveness of particular marketing initiatives

Exhibit 3 provides a template that could be used in preparing your marketing plan.

Target Markets

Different festivals have different objectives and focuses. Generally speaking festivals fall into three categories; community-based, special theme/interest and tourism-based. The target markets and marketing approaches differ.

Community-based Festivals

Most community festivals traditionally have their local resident population as their primary target market. This is not surprising as most festivals are a celebration of something that is special about the local community, and are intended for local residents.

The marketing challenge in this case is a relatively simple one; local media and local partner organizations can readily reach the target audiences and have an interest in doing so. The local media are interested in newsworthy items, and a festival certainly qualifies. While they would love to have you advertise with them, they will nevertheless be willing to provide free publicity.

EXHIBIT 3
MARKETING PLAN TEMPLATE

Target Market	Positioning of the Festival/Event for this Market	Tactics to be Used to Reach this Market	Budget	Tracking Methods to be Used

Local organizations that have an involvement with the festival will almost certainly promote it to their members. Local companies that are sponsors will help promote their involvement through their own locally-focused marketing.

Theme Festivals

Theme oriented festivals focus on a particular topic of interest to only certain audiences and appeal to people having that special interest. This kind of event would typically be promoted to the local market as well, but is more than likely going to reach beyond as well. It targets people from a broader market that have this particular special interest.

In this case the route to market is in part through local organizations and local media. As well, it can include more distant clubs and other 'affinity' (membership-based) organizations that link to the festival's theme and are willing to promote the event to their members.

If the festival has a marketing budget, it may choose to advertise in special interest media that cater to the same audience. In any event, the festival will certainly attempt to arrange free publicity with such media through press releases, interviews and feature stories.

Tourism-based Festivals

These festivals are really a hybrid of one or both of the foregoing. The idea here is that you modify the festival's programming and services, and the marketing approach, to extend its appeal to broader markets at a distance. The benefits are obvious; growing festival attendance and revenues and creating economic activity for the broader community.

To turn a community festival or a theme festival into one that is intended to attract tourists involves some modifications. These were discussed in Section 2, under 'A Festival as a Tourism Generator'.

From a marketing perspective, an expanded marketing effort will be required.

Tourists in the Area at the Time of the Festival

First, you will want to reach people who are travelling through your area at the time of the festival to appeal to them to modify their itinerary and attend. This can be accomplished in part through tourism-oriented media such as the regional tourist guide, the Provincial Festivals and Events Guide and the Provincial Doers' and Dreamers' travel guide. Another tactic is to have the tourism operators in your region, and in overnight stay communities in the province, promote the event through displaying your poster, your brochure or a dining room tent card. Local community businesses should be asked to display the brochure and poster. The regional and local visitor information centres should be asked to display the brochure and poster as well and to encourage people stopping at the VIC for information to visit your festival.

Residents of Markets Located Within a Few Hours Drive

These potential attendees have to be motivated to make a trip to attend the festival. There should be formal promotion and publicity of the event through the media in those locales (e.g. news items, press releases, feature stories) as well as on your web site.

Catering to this market can be achieved by offering special 'getaway' packages for tourists.

Longer-haul Tourist Markets

Some festivals have the potential to draw tourists as well as local and regional residents. They also have the potential to influence people already coming to Nova Scotia to include the event in their itinerary. This is the case with major festivals and events (e.g. Halifax Jazz Festival), and those that are highly unique and exemplify the particular culture of the destination (e.g. Celtic Colors International Festival.)

You need to consider carefully whether your festival merits this stature before rushing headlong into pursuing longer-haul markets and tour operator business. The capability to handle groups is also a factor in attracting tour operators.

For those festivals that meet the test, we recommend approaching tour operators that have tours in your area. This is however a considerable challenge for a number of reasons:

- It is difficult for them to modify their itinerary, particularly for an event that isn't available to all of their tour departures. It is further complicated if it requires any significant rescheduling of the rest of the itinerary.
- They are hard to reach as they are inundated with solicitations from thousands of others wanting their product added to the tour operator's program. A considerable time, effort and cost can be involved.

If your event is one of great appeal, it is still conceivable that tour packagers may be willing to respond. We suggest you talk to your local/regional destination marketing organization (DMO) for advice on this. If they agree with the idea, they may be willing to pitch the tour operators on your behalf. Your DMO is likely to get a better hearing than you would on your own, as tour operators generally prefer to deal with organizations that can represent a whole range of product at the destination, rather than with independent tourism operators directly.

A better approach may be to contact the tour operators based in the Atlantic region that organize their own tours as well as provide receptive services for other tour operators. They are easier to reach and have a relatively greater interest in unique products in the region. They may, in fact, be willing to organize and market a package around your festival. They also are a route to reaching other tour operators because of the receptive services they provide to them. The major Nova Scotia based companies, in alphabetical order, include:

- Aberdeen Tours – Into the Wilderness, Halifax
- Atlantic Cruise Ship Services Ltd., Halifax
- Atlantic Tours Gray Line, Halifax
- Canadvac Travel Services Ltd., Caledonia
- Taymac Tours, Halifax
- White Point Vacations, Queens County

These companies can be approached directly, or through your local/regional destination marketing organization.

Group Markets

In addition to consumer markets, there are several others that may offer potential to your festival:

- Corporate groups – Your festival may be of interest to a company seeking a staff outing, a social function or a client function. The event provides an opportunity to mix business and pleasure. This will be particularly the case with companies involved in sponsoring your event.
- Affinity organization groups – Your festival may provide an extra motivation for people to attend.

In both cases, you will need to have access to group function facilities, including catering. You will also need someone who can work with these groups in planning and coordination.

We now turn to the various marketing tactics you may wish to employ in promoting your festival. *Where partners and others can do this for you, or assist, we provide suggestions in italics.*

7.2 Website and e-marketing

The Internet and websites are increasingly becoming a central element of marketing. More often than not these days, other promotional activities are designed to 'drive' people to the website for more information, for booking and for buying. It can be a most useful tool for a festival. In this manual we don't get into the details and technicalities of website development and e-marketing; however, if you need more information you can find it in a companion guidebook to this one, 'A Guide to Starting and Operating a Commercial or Community Attraction'.

With a festival, you may want to consider some combination of the following functions and features for your website:

- Promotional information for target audiences
- Promotional information for the tour operators and corporate group markets
- Information on dates, times of opening and closing, dates and times of special programs, prices, customer services and so on
- Information on your sponsorship program
- Information on your volunteer program
- Background information on the origins of the festival, its objectives and its history
- Contact information, including an email section

You will want to link your website to your partners and others, and have them link their site to yours in appropriate cases. Examples include:

- Your sponsors
- Your community and regional partners
- Your tourism marketing organizations – in the community, the region and the province.

E-marketing is a growing phenomenon as well: it is fast and cheap. Connected to a digital database, email can be sent to different categories of people registered with you.

Today, privacy laws require you to obtain permission from an individual to solicit business from them through direct marketing; this is referred to as 'Permission-based Marketing'. People that opt-in to receiving more information by registering on the website can be communicated with in future through email broadcasts of special offers, contests, newsletters and the like.

You will also want to make sure your festival is listed in Nova Scotia's database of festivals and events which can be accessed through www.novascotia.com. Festival and events organizers can enter and update information on their own event in this data base at their convenience, through a password protected access. Contact the Marketing Division at the Department of Tourism, Culture and Heritage for more information.

7.3 Promotion

A number of different promotional techniques can be effective in building awareness and motivation to attend a festival.

Branding

Having a recognizable brand is helpful, particularly one that communicates the unique appeals of the event and its market positioning relative to other events. The brand can also be used by partners and sponsors in helping you promote the event and in connecting their organization to the event. This is important, particularly for sponsors who want to benefit from the publicity value of providing support for your event.

Brochure

A brochure is an important marketing tool. It can be used in direct mail promotions, in visitor information centres and in a counter or floor display in the establishments of your partners and sponsors. You may also want to ask the owners of high traffic establishments such as shopping malls for permission to erect a floor display, in which case you will have to arrange for someone to maintain it.

This is an area that the partners and/or sponsors can really help. By featuring them in the brochure you have a strong case for them to fund some of all of the costs of design and printing.

A brochure distributed in advance of the event can also be effective in promoting things that people can buy in advance, such as 'passports' providing multiple admissions, and/or reduced rate 'early bird passes', as well as packages offering deals on hotel and admissions tickets, for example. The latter would be undertaken in conjunction with one or more hotel sponsors. The hotels would handle all sales of the packages and provide a voucher that can be redeemed for admission tickets to the festival.

Brochures that are designed to elicit a response should be designed in keeping with the classic AIDA formula:

1. Capture **Attention**: First you have to draw the consumer's attention. Use the front cover to do this. Use an attractive, lure picture of your product. Since brochures are frequently displayed with only the top part showing, make sure that the top one quarter of your brochure describes the experience you are offering.

2. Develop **Interest**: Build interest in what you are offering. This should be done on the second panel with photographs and text describing the appeals of your product. Use pictures of people enjoying your product.

3. Create **Desire**: Create a desire for the product. Provide enough information for people to decide whether or not they want to visit your attraction. Focus on your competitive advantages and unique selling propositions (USPs).

4. Call to **Action**: Turn that interest and desire into action. Your back panel should be a call for action and include - where to find you and how to get there, where to phone to make a reservation or for more information, your address, etc.

The same principles should be used in designing other promotional tools, including advertisements and mailers.

Advertising

Media Advertising

Advertising media that make the most sense for promoting a festival include newspaper, radio, TV, billboard and posters.

Media advertising is expensive. *This is another area that it would be worthwhile to get sponsors in particular to help out by getting them to place ads on your behalf and/or add a banner about the festival in their own advertising.*

Advertising in traditional media is generally the most expensive element of your marketing plan. Effective advertising requires a clear understanding of the target group, your product strengths, and the available media options within your budget. Advertising can create awareness of your business and encourage consumers to try your product.

If you are going to invest anything more than a small amount of money in advertising, then you should seriously consider obtaining professional assistance from an advertising agency. The agency can help you design your ads, identify the best media to use, buy the media, and generally manage your advertising program.

If your advertising program is too small to make using an advertising agency practical, then there are others who might be able to help:

- Local printer: he or she should have some expertise in ad design and layout;
- A local marketing partner selling a product complementary to yours;
- Your local newspaper, radio station, etc.;
- Your local tourist association coordinator;
- A local art or communications instructor/teacher.

The key point is get help from someone who has expertise in marketing and communications techniques.

There are many types of media advertising and some will work better than others for your product. The basic approach to follow when deciding which media to use is to choose those mediums that reach your target audience most cost effectively. You will have to do some homework to determine this – contact media representatives and ask them to send you information on such things as audience profiles, market coverage, and circulation.

Don't forget to look at advertising as an investment – not as a one-shot deal. You will not always get noticeable results from one advertisement, so stay away from expensive media if you cannot afford to repeat your advertisement frequently enough to achieve an ongoing awareness.

The main categories of media are: print (newspapers, magazines), outdoor (effective signage), and broadcast (radio and TV).

Co-op Advertising

Cooperative advertising works on the strength in numbers principle. In general, several organizations (e.g. business, government, associations) with a mutual marketing need will join forces. For example, an area travel association may welcome area operators into sharing the costs of a co-op brochure or a full page ad for the entire destination. This may be effective for you.

More information on the Province's partnership marketing programs is available on the Tourism Partnership Council website at www.nstpc.com. Click on 'Partnership Opportunities' and download the 'Partnership Opportunities Book'. Of particular note are the following:

- Festivals and Events On-line Information
- Festivals and Events Guide
- On-line Packages and Special Offers

Contra Advertising

Contra advertising, or swap advertising, has long been a factor within the tourism sector. Basically, contra involves trading media coverage for some of your product. This is often done for contests, where a resort, for example, gives a free weekend as a prize for a radio contest and receives plugs on the air or actual advertisements at no charge.

Posters

Posters are a particularly good technique in that they, like brochures, can be displayed at the establishments of your partners, sponsors and other organizations that are prepared to support the event by displaying your poster.

Hotel and restaurant frontline staff and taxi drivers are often overlooked as a promotional source. Since a high percentage of tourists use these services and very often ask questions, including what's happening in town, these are important marketing partners to consider. Through an arrangement with their employer, staff can be informed of the event and be given brochures or program information. It would help their motivation to support the festival if you offer them free admission. What better ambassadors could you find than these people?

Signage

Having good signage to the community and to the festival site is of critical importance to a festival. Having quality signs, with letters large enough to read clearly and located throughout the community should be your objective. *This could be a program area that is sponsored.*

As discussed earlier, festivals having attendance in excess of 10,000 are eligible for a tag on the adjacent 100 series highway community blue sign.

Direct Marketing

If you have access to databases of good prospects for the festival, a direct mail or email communication may be effective in generating interest in the festival, and particularly for group business where the target audience is organizations rather than individual consumers. The same applies to the client databases of your partners and sponsors.

Direct selling to companies and affinity organizations through phone and/or in-person solicitations may be effective. This might be the method of pursuing group business.

Direct selling is definitely the preferred method of soliciting partners and sponsors for the festival.

Sponsor Promotion

As mentioned earlier, *it is a good idea to work with your sponsors on marketing the festival.* This can include any or all of the following:

- *The sponsor paying for some or all of the festival's advertising.*
- *The sponsor paying for a portion of the advertising through a cooperative arrangement with some or all of the other partners and sponsors*
- *The sponsor including promotional messages for the festival in its own advertising to its own target markets.*

Special Event Promotion

A major show occurring as part of the festival can be promoted in its own right, along with secondary messages about the festival itself. *In cases where the event is sponsored separately from the festival itself, that event sponsor should be looked at to lead and fund the marketing effort.*

Tourism Promotion and Travel Trade Promotion

A similar approach can be taken to tourist oriented packages and other such offers made in collaboration with tourism industry partners. *Again, the tourism partners should be looked to to lead and fund this marketing.*

Another aspect of tourism marketing is promoting the festival to the tour operators that have programs in your area. This is a somewhat complicated process that is better handled by the destination marketing organizations in your community and/or region, or by the Department of Tourism, Culture and Heritage's travel trade sales effort. Suggestions as to specific tactics for working with this market segment were discussed earlier.

Cheap and Free Techniques

There are a number of free or almost free promotional techniques possible, some of them paid for by others, for example:

- *Coupons for reductions on festival entry fees, or a value-added feature, used as product promotions by businesses in the community. The festival could charge back a portion of the discount to the company issuing them.*
- *The same kind of coupons offered through the websites of sponsors, partners and other businesses in the community.*
- *A similar approach with packages being offered by others, containing a voucher for reduced price admission to the festival, or a value-added feature.*

- *Posters and signs in municipal buildings and on their vehicles.*
- *Host a tourism frontline staff day at the festival when it opens, with complimentary admissions and some VIP attention. This will engage them as ambassadors for the festival as well as equip them with the information they need to be able to answer questions about the event from their customers.*

Complimentary Admissions

VIPs, sponsors, police and emergency personnel families as well as volunteer families can be provided with complimentary admissions as a thank you for their support. This makes them goodwill ambassadors for the festival. As mentioned above, doing the same for tourism frontline staff can also be effective.

There is often a fear within festival organizations to give out free tickets. Here is an alternate way to think about it. Providing volunteers and partners with free access builds community support. If John Doe's son is a volunteer of the festival, John, Jane and the other siblings are going to buy a ticket and go support their own. Each complimentary ticket will usually sell 3-4 other tickets. The Stan Rogers Folk Festival has 600+ volunteers, all of whom get free access. Key volunteers miss a good portion of the festival. If they aren't granted access to the rest of the event, outside of their work time, they will feel they've missed out on something. Often this results in disappointment and a decision to not volunteer in the future.

Appreciation Events

Events held in appreciation of the help received from staff, volunteers, sponsors, emergency personnel, etc. are successful in building affinity for the event. These measures build a network of 'friends' of the festival.

Tracking Results

We strongly recommend that festival organizers make an effort to measure the impact of their various promotional efforts. This is really important in keeping your partners and sponsors 'at the table' for future years. Techniques useful in tracking response include:

- Using coupons and vouchers with purchases that can be counted.
- Have attendees fill out questionnaires, with questions about how they heard about the festival.
- Using names to respond to, such as "Call Pat at (phone number)", which signals the origin of the call in terms of what promotion prompted the call. Different names are used for different marketing initiatives. (Note: It helps to use names like 'Pat' that are non-gender so that a male or a female can be the person called.)
- Conversion research – calling people that enquired to see if they actually came.

7.4 Publicity and Media Relations

Publicity is communications that you don't pay for. It can be good or bad, depending on how it comes about. It can be good if it is instigated and directed by the organizing seeking it; and it can be bad if it is instigated by someone else having another agenda. The media plays a central role in all of this. Your festival organization should be proactive in working with the media on the positive kind of publicity.

The media organizations in your community and in the region can be extremely helpful in promoting your festival, in a number of ways, including:

- Arrange radio/TV broadcasts from the festival site during the event – morning shows, newscasts and weather forecasts, visiting VIP interviews and call-in shows all lend themselves to on-site broadcasts. Also, interviews with festival organizers, entertainers and VIP attendees can be done on-site or in-studio.
- Host an invitational media event prior to or at the beginning of the festival to introduce the media to the program and answer their questions. It helps if you offer some inducements, such as complimentary passes for them and their families.
- Prepare stories on your event, preferably with photos, that are suitable for publication by the media, and provide them to the appropriate media people.
- Your sponsors and partner organizations could hold their news conferences at the festival.
- You might offer the festival site to fundraising organizations for their special events during your off-hours (such as a pancake breakfast for The United Way). The other organization will attract and coordinate the media themselves, with your festival benefiting at no cost and with little effort expended.
- If you were to get involved with another event, for example, if the town has a 'Heritage Days' theme week, the festival could provide entertainment on certain occasions and attract publicity in this way.

Create a newsworthy event of interest to the media's audience and you will have their cooperation in telling the story.

Given its importance to a festival, publicity and media relations deserve special attention. This is an affordable and powerful means of reaching your target audiences. Most festivals have a number of newsworthy aspects and the media organizations will usually be pretty cooperative. It's a win-win relationship.

Have a look at a paper from the Association of Research Libraries, entitled 'Media Map: Charting a Media Relations Strategy'. It offers helpful information on press releases and other techniques of dealing with media. Their website is www.arl.org.

The Media Plan

Dealing with the media is complex activity requiring specialized skills and effort, and it needs to be planned and properly prepared for. It similarly requires research into the different media that you might wish to target. Understanding how they work and think is important.

The main audiences you will normally target via the media include:

- The residents of the community
- Residents of communities within a reasonable drive time
- The owners and managers of organizations in your community and region
- Tourists visiting your area

You need to select the media that are appropriate for your desired audiences, without a lot of 'spillage' (spillage is other audiences you automatically reach in a particular promotion that will have little or no interest in your festival/event, such as those at a greater distance).

It is also important to understand what is newsworthy. Unfortunately much of what the general media focuses on, because their audience will read it, are disasters crime, court rulings, conflict, controversy, celebrity antics and politician statements. None of these are particularly relevant to promoting a festival. The kinds of newsworthy things that a festival might focus on include:

- News about the forthcoming festival program and its entertainment events
- VIP and celebrity visits
- Human interest stories – festival staff and volunteers, entertainers, VIPs and other visitors
- Dramatic events/happenings where there are photos

Special Interest Media, Tourism Media

If you have a special interest theme to your festival, you will want to target the special interest media that reaches the relevant audience. Feature stories and photos can be particularly useful here.

Similarly, if you are targeting tourism markets, getting publicity through media that reaches these segments is worthwhile. Examples include the regional travel guide for your area, the Halifax newspapers, 'Where' magazine, the Canadian Tourism Commission's 'Tourism' magazine, and travel trade magazines, such as 'Travel Courier'.

Media Tools

Where the media is being targeted to communicate your information, there needs to be an appropriate approach to accomplishing this. The tools involved include press releases, feature stories, public service announcements (PSAs) and in-person interviews. These are discussed below.

Press Releases

There is a science in designing press releases and in getting them used by the media. A good press release has the following features, in this order:

1. FOR IMMEDIATE RELEASE should be printed at the top left margin, just under your letterhead.
2. Two lines below, put in a headline in boldface type
3. Put in a 'dateline' – the community your press releases is issued from and the date you are distributing it
4. The first, introductory paragraph of text should capture the essence of the announcement. It should be an attention-grabber and contain the key relevant information, such as the five 'W's' (Who, What, When, Where and Why).
5. The main body text to follow provides more particulars and a fuller description.
6. Contact information is provided, including the name, title, email, phone and fax numbers of your spokesperson, plus their home phone number. (The home number is important because reporters work to deadlines and may not be able to call during business hours.) This information can be provided at the end of the release, or at the top, following the headline.
7. The website address of your organization and links to more detailed information available.
8. The press release should be 1 or 2 pages maximum, typewritten, double-spaced and printed only on one side of the page.

Getting a particular medium to use the information is a challenge. Your pitch to them needs to be done properly. They need to be convinced that the information is 'newsworthy'. The golden rule of media, and newsworthiness, is 'empathy'. The reporter/editor and the audience of the medium need to connect to the message. It has to be interesting and meaningful to them.

The following issues need to be addressed in your communications with the targeted media:

- Who you are and where you're from
- What's new about what you're trying to communicate
- Why it's different
- Why their audience will/should care
- How it ties in with other newsworthy events
- How it relates to other stories of interest

The following additional points are instructive in getting media people to be responsive:

- The information shouldn't be unduly promotional or self-serving (at least not obviously so). It needs to be timely and relevant to the audience.
- Put in quotes if you can. It adds credibility. Publicly known people are better.
- Send it to the right reporter or editor. To this end, look at the publication and track down the names of the writers that deal with your kind of information. Seek out the masthead for the editor's name for the relevant section of the publication and contact that person. Mail, fax or email all work.
- Keep the release relatively brief, and avoid long sentences. Concise is good; rambling is bad.
- Have more details at hand in the event you get a call, organized by each of the key points in the release.
- Call to follow up to make sure the release has been received and noticed. Offer more particulars. Be ready to explain why it's important for that medium to carry this message. (Don't call late afternoon after 3 PM as this is close to deadline time.)

Here are a few websites that present 'how to's' of writing and distributing press releases:

- www.press-release-writing.com
- www.infoscavenger.com/prtips.htm
- www.pressflash.com/anatomy.html
- http://lamar.colostate.edu/~hallahan/hpubty.htm

If the news is ***really*** newsworthy, you may want to do a feature story as well and have it available to the media.

Check out the paper from the Association of Research Libraries referenced earlier in this section.

You should also review the tips on giving media interviews presented in Section 4. The publication in the paper noted above is very helpful in this regard as well.

Feature Stories

Some media will be interested in a feature story about your festival, about your organization or about some of the leaders in your industry. A business magazine is one example. Your hometown paper is another. Drafting an article that is likely to be of interest to a particular medium and offering it to them can often be effective. It makes it easy for them to pick it up, as is or in edited form, saving them the research effort.

If you are doing an annual report or major presentation, why not also invite the media and/or draft an article about it as well and offer it to the kind of media that runs stories of this type.

Public Service Announcements

PSAs are free announcements made by media, usually radio, about a forthcoming event of interest to its audience. Some of the initiatives we discuss later will lend themselves to this. And the price is right!

Photos and Audio-Visual Materials

Having photos and AV materials at hand will be useful, particularly in your dealings with the media.

Photos/Captions

It is a good idea to provide colour photos to the media along with your press releases or feature story, preferably featuring a person involved in the story, or an aspect of it. Ideally, these should be of professional quality. Captions describing who/what is in the picture are important and need to be provided.

Digital versions are increasingly preferred. Making them available on your website is a good idea.

Audio Visual Materials

Here are some ideas about AV materials:

- Radio and TV can make use of a taped speech. TV can as well, as long as you also provide a photo of the speaker.
- A video clip is even better for TV, but make sure the format is usable by the TV station.
- Video clips can also be used in your presentations to municipal council and other groups

Media Relations

'Media relations' means just that; establishing a relationship. Having a plan that includes relationship development is vital. Media relations professionals work steadily at developing and maintaining on-going relationships with key media people. This involves making sure that the media person is fed with newsworthy information on a regular basis and that they are assisted in understanding how this kind of information is relevant to their audience. That leads to a trusting situation where the media person will respond to your communications and attend your press conferences. If they don't know who you are and why they should pay attention to you, they likely won't.

We turn now to the different kinds of media activities you will want to consider.

Press Releases

Press releases will be an important part of your media activity in advance of the festival and when really newsworthy events occur.

Normally a press release is emailed, faxed or mailed to the target media on a designated release date so that they all get it simultaneously. The latter point is critical; in the media, news is only news for a short, fleeting period. Yesterday's news is of little interest.

News Conferences

These are useful when really big news is in play, such as a major announcement. You will have to convince media invitees that the news conference really warrants their attendance, which is easier to do if you have an ongoing relationship with them; very difficult otherwise.

News conferences make sure everyone gets the same information simultaneously and gives them the opportunity to get questions answered immediately. It's important to make sure all the people who might be questioned are in attendance.

Attendees should be provided with your news release, along with supplemental background material as well as pictures and biographies of the key people and organizations involved.

Go On TV and Radio, Give Interviews

A request for an interview is a frequent result of a press release and/or conference. It is important that your spokesperson be properly prepared in advance. You need to control the interview to the extent reasonably possible. Here are some useful tips:

- As mentioned earlier, have the details at hand in the event you get a call, organized by each of the key points in the release. Avoid jargon, technical terms and acronyms.
- If possible, practise the interview by conducting a mock one with someone else.
- Prepare and rehearse your responses to expected questions, and also to possible nasty questions, in a fashion that minimizes damage and puts the issue in a more favourable light.
- Where you can, bracket your important messages in your notes and insert these statements into the interview where you can.
- Like all good politicians do, when you get a question you are not happy with (e.g.: a dumb or irrelevant one), answer one that you want. You don't have to answer the question exactly as posed. Use it instead as an opportunity to address the general topic in the fashion you prefer. It usually disarms the interviewer if you preface your response with "I'm glad you asked me that question…." (Another lesson from politicians.) Another method is to first restate your understanding of the question in a fashion you prefer.
- Make sure you have solid evidence (supporting information) of accomplishments being claimed.
- Correct any wrong information right away. And don't repeat the wrong information in your reply as there is always the risk your answer is used out of context.
- Be ready with the names and contact information for others in your organization that the reporter may wish to speak with, or who are better able to answer some of the questions. Ideally, these people need to be warned, briefed and armed with some notes.

- Use the name of the organization in preference to "we, I, our", etc. It helps reinforce brand awareness.
- If possible, make a closing statement that reinforces the key points on your agenda.
- Ask to see the draft article and particularly any quotes the reporter intends to use. This an accepted thing.
- Also ask when the article is likely to run/air so that you don't miss it. Make sure you get a copy, as you might want to quote from it in future.

Media Events

The media relations program for organizations that have regular dealings with the media should include an invitational event at the festival, including a group tour. The idea is to make it interesting, entertaining and easy for the media people to pick up stories and get personal interviews. These are typically social events to which a good number of your organization and its partners and sponsors attend and make themselves available to the media. Organizers, sponsors and VIP should wear nametags with their title and affiliation clearly evident.

The event should start with a welcome and introduction of attendees, followed by a brief presentation of newsworthy information, perhaps a press release or two, then move to an open format that allows the media people to talk to the other attendees one-on-one. The group tour would be fitted in at an appropriate point.

Sponsors and partners should be looked to to fund or share in the costs of such events.

Media Familiarization Visits

Another technique that can be effective is to invite media people to visit the festival, with their family members at a time of their choosing. They should receive complimentary access accompanied by a media information package, making sure they get the information you want them to publish.

Visiting VIP Interviews

If an important person or an entertainment celebrity is visiting, arrange a press briefing and opportunity for one-on-one interviews. It is better if you 'coach' the VIP on the key messages you would really like them to use in support of the festival.

7.5 Public Relations

Getting your community on side and keeping them there can be a considerable challenge, but it is vital that it be addressed.

It is important that local residents feel they have a say on issues that impact them, (e.g. noise, traffic, parking on residential streets, access to their neighbourhood etc.). They will also want to know who to call if they have any problems with the festival. Should they call City Hall or call the festival directly? They will be interested and willing to listen to the benefits to the community of having the event, but they will be more concerned about how it all affects them personally.

Churches are an important part of the process, particularly because their clientele come at particular scheduled times. Check in with those nearby about their regular services, weddings, funerals and other ceremonies that might be impacted. Determine what can be done to mitigate impacts. Noise, parking, and access issues will need to be addressed with them.

The same is generally true with other enterprises who will be affected by noise, traffic and parking impacts. These include retailers and company offices. A meeting with these businesses will help ease any fears they may have about access to their operation.

Municipal councillors, the mayor and other community leaders are crucial to have on your side. Meet with them on an individual level in your planning stages if possible. They will more than likely have a good handle on potential issues and community concerns. Invite them to your public consultations and invite them to press conferences or a media launch.

Offering complimentary or discounted admissions to local residents nearby can go a long way to a complaint-free event!

We also discussed earlier the idea of inviting tourism frontline staff to the event on a complimentary basis to empower them as goodwill ambassadors for the event. This will also be helpful with this issue.

SECTION 8

Post Event Issues

SECTION 8

POST EVENT ISSUES

When the festival is over, it's not really over! There are a few things we recommend you attend to. These will help to ensure that next time the event will go more easily and successfully. This requires attention to the following:

1. Assessing what worked and what didn't, and how successful the event was in its different aspects.
2. Maintaining and building on your partnerships and sponsor support.
3. Keeping your volunteers enthusiastic about continuing their involvement.
4. Growing the festival in future, in the right ways.

Each of these is discussed in turn in this concluding section.

8.1 Evaluation

There are several things we recommend you do to evaluate the outcomes of the festival; some are done during the event, others afterward.

Visitor Survey

We recommend you ask your attendees, some or all of them, to complete a brief questionnaire to get insights into a number of things. Particularly you will want to know what was good and bad about the event. Also you will want to gauge the effectiveness of your marketing (i.e. track the results as discussed in the last section). A sample questionnaire is provided in Appendix 2.

Debriefs with All Committees and Stakeholders

It is vital that you meet with your partners, sponsors, municipal support departments and other community stakeholders to give and receive debriefs. Here are some suggestions in this regard:

- Keep a record of all your meetings with stakeholders so that you can refer back when necessary to resolve a question about what happened.
- In the debrief sessions, identify all the things done well as well as the things needing improvement. But make sure that the mood does not turn into a forum of attacks and that each issue also has recommendations for the future discussed and recorded. This will provide an excellent starting ground for future editions of the festival.
- It tends to work well to hold one or more meetings with internal committees and a separate meeting(s) with external stakeholders (community associations, businesses, churches, residents). If the festival had more of a negative impact on the community than expected, it would be wise to break up the meetings and have external stakeholder organizations at one meeting and the general community at another.
- If the event ended up in a particularly poor way in some regard, and the media becomes involved and focuses on that issue, remember to have a designated media representative

and remind staff and volunteers to refer the media to that person. Suggestions in this regard were provided earlier in this guidebook.

Attendance Counts, Revenues/Costs

This may be obvious, but it will be important to record and report information about the numbers associated with the festival; attendance, revenues, operating costs, sponsorship, partner contributions and so on. This will be vital to maintaining and building support in the future.

Walking Around

A management guru has advocated 'management by walking around'; the idea being that the best assessment of what is working and what isn't is by witnessing it yourself. This is a highly recommended procedure for your festival. In fact, it should be organized in a fashion whereby there are daily reports from festival management people who are mandated to make a site tours on a scheduled basis.

Economic and Community Impact Assessment

Measuring, recording and reporting the benefits to the community of the festival is not only important, it is likely to be vital to maintaining support, particularly from public agencies who are generally under constant pressure to cut spending wherever possible. Don't let your event slide into the 'discretionary spending' category. Rather it needs to become 'vital' in various ways to the community and therefore untouchable by politicians.

One of the best ways to accomplish this is to report on the economic impacts of the event. This can be done in a sophisticated fashion involving specialized visitor research and use of an economic impact simulation model, or it can be done more simply and probably just effectively (or more-so depending on the audience) with some basic information. We would suggest the following information be recorded and reported (sources are in brackets):

- Attendance volumes (gate counts)
- Non-resident attendance (portion of the visitor questionnaires completed by non-residents)
- Revenues from on-site spending of all visitors (admission and other on-site revenues)
- Other spending in the community by tourists (as reported by visitors in the questionnaire)
- Number of people employed by the festival and the wages and salaries paid to them
- Taxes paid by the festival

Other impacts/benefits of a beneficial nature to the community might include:

- Pleasure, fun, entertainment, community pride, visits from friends and relatives and other benefits resident attendees gained (portion of the visitor questionnaires completed by local residents)
- Facilities added or improved in the community as a consequence of the festival
- Awareness of the community among tourism markets (portion of the visitor questionnaires completed by non-residents; also interviews with tour operators)

8.2 Keeping Your Friends

The partners and sponsors you sold on working with you the first time need to be encouraged to maintain their support in the future. This can be accomplished with the following kinds of initiatives:

- Follow up is vital with sponsors and partners to make sure the festival is meeting their goals and how to better meet them next year.
- Sponsors will want to see evidence of where their logos and name appeared. A 'scrapbook' developed and maintained throughout the event will serve this need well.
- One way to avoid problems with sponsors is to be as fair as possible across the board when negotiating contracts and maintain that policy. For example, don't offer one sponsor a title sponsorship of an event for $15,000 and the offer a similar title sponsorship for $5,000 just because you are in a panic and making deals a week before the festival. Maintain the integrity of the program as much as possible.
- Whatever else you do, make sure you make your appreciation of the relationship clear, either through one-on-one appreciation initiatives, or through organizing a collective appreciation event following the festival. This could take the form of a dinner, a group outing or some other such event.

In general, keep in mind that a "partnership" is more than a contract. Strong partnerships take into consideration the future and are designed to achieve a lasting relationship of mutual benefit. This is especially true with community partnerships. You have to live with community organizations for the long term, for better or worse, so try for 'the better'!

8.3 Countering Volunteer Burnout

Volunteers play a major and vital role in festivals, and particularly so with community festivals that commonly have few if any staff. A challenge with volunteer driven events is volunteer burn-out. This is a situation wherein those with the experience and skills find it difficult to find others to step in and allow them to reduce their own involvement over time. This leads to a few people being expected to do too much, with the longer term impact being burnout. Unchecked, this can lead to an unravelling of the festival organization and the quality of the event going downhill.

Countering this natural tendency requires a serious commitment to attracting and developing new people. As discussed in Section 5, this can be greatly aided if there is a significant volunteer recognition program in place; one that celebrates their contribution and showcases them as valuable community members.

8.4 Building on Success – Growing and Improving the Festival in the Future

Being successful is wonderful. But being too successful too fast can be dangerous. Take care to build on success in a controlled fashion, with each new step being carefully considered, planned and implemented. It is important that only a few innovations be added each year so they can be implemented without undermining other activities.

At the same time, try to be open to positive change. Change can renew and refresh your festival and your organization as well. This strengthens the appeal of the event among past visitors. It counters the 'been there, done that' attitude – the customer burnout factor which is often at play.

Keeping your festival fresh and exciting is a key success factor. But don't forget your roots or who and what you are.

How do you balance the 'change, but not too fast' issue? It's simple in concept, but less simple in reality. Move ahead with opportunities, but don't go too fast or take on too much all at once. Organizing an event is a major balancing act.

It's also important to 'keep your eye on the ball' in terms of the original objectives of the festival. Be careful not to stay too far from those objectives as you could lose your reason for being, and your supporters as well. That isn't to say that you should never revisit your objectives and revise them based on new realities or new opportunities.

ACKNOWLEDGEMENTS

ACKNOWLEDGEMENTS

The Department of Tourism, Culture and Heritage would like to acknowledge the assistance of Troy Greencorn for his input to this manual, and of members of Nova Scotia's Festival & Events Council for their review and input.

APPENDIX I

List of Contacts

APPENDIX I

LIST OF CONTACTS

Provincial Tourism Contacts

Department of Tourism, Culture and Heritage
1800 Argyle Street, 6th floor
Halifax, NS
B3J 2R5
Tel: 424-5000
Website: www.gov.ns.ca/dtc

Tourism Division - Tourism Development
(Also the contact for information on the Festival Signage Tag available for 100 series highways)
Fax: 424-0629

Tourism Division - Tourism Marketing
Fax: 424-2668

The Nova Scotia Tourism Partnership Council
World Trade and Convention Centre
Suite 603, 1800 Argyle Street
Halifax, Nova Scotia
B3J 3N8
Tel: 424-0048
Fax: 424-0723
Website: www.nstpc.com

Provincial Government

Service Nova Scotia & Municipal Relations
1505 Barrington St., 9th Floor, South
PO Box 2271
Halifax, NS
B3J 3C8
Tel: 424-5528
Fax: 424-1298
Website: www.gov.ns.ca/snsmr

Access Nova Scotia
Toll free: Throughout Province:
1-800-670-4357
One-stop shopping for government programs and services. Maintain database of contacts for government departments in each region regarding appropriate permits, etc. Also contact for new Nova Scotia Business Registry.

Regional Access Nova Scotia Offices:

Access Nova Scotia - Amherst
Superstore Mall
126 South Albion St.
Amherst, NS B4H 2X3

Access Nova Scotia - Antigonish
20 St. Andrew's St.
Antigonish, NS B2G 2L4

Access Nova Scotia - Bridgewater
77 Dufferin Street
Bridgewater, NS B4V 2W8
Tel: 1-800-670-4357

Access Nova Scotia - Halifax
West End Mall
6960 Mumford Rd.
Halifax, NS B3L 4P1

Access Nova Scotia - Kentville
28 Aberdeen Street
Kentville, NS B4N 2N1
Tel:1-800-670-4357

Access Nova Scotia - Port Hawkesbury
218 MacSween St., Ste. 22
Provincial Building
Port Hawkesbury, NS

Access Nova Scotia - Sydney
Moxham Centre
380 King's Rd.
Sydney, NS B1S 1A8

Access Nova Scotia - Truro
35 Commercial Street, Suite 101
Truro, NS B2N 3H9

Access Nova Scotia - Halifax
West End Mall
6960 Mumford Road
Halifax, Nova Scotia
B3L 4P1

Access Nova Scotia - Dartmouth
Superstore Mall
650 Portland Street
Dartmouth, NS B2W 6A3

Access Nova Scotia - Yarmouth
Provincial Bldg.,
10 Starrs Rd., Ste. 127
Yarmouth, NS B5A 2T1

Nova Scotia Department of Agriculture &
Fisheries - Food Safety Section (Halifax)
PO Box 2223
Halifax, NS
B3J 3C4
Tel: (902) 424-1173
Fax: (902) 424-3948
Website: www.gov.ns.ca/nsaf

Nova Scotia Department of Agriculture &
Fisheries - Food Safety Section (Truro)
P.O. Box 550
Truro, NS
B2N 5E3
Tel: (902) 893-7473
Fax: (902) 893-6531
Website: www.gov.ns.ca/nsaf

Nova Scotia Department of Natural
Resources
P.O. Box 698
Halifax, NS
B3J 2T9
Tel: 424-5935
Fax: 424-7735
Website: www.gov.ns.ca/natr

Nova Scotia Department of Environment &
Labour
5151 Terminal Road
PO Box 2107
Halifax, NS
B3J 3B7
Tel: 424-5300
Fax: 424-0503
Website: www.gov.ns.ca/enla/

Nova Scotia Office of Economic
Development
P.O. Box 2311
14th floor South, Maritime Centre
1505 Barrington St.
Halifax, NS
B3J 3C8
Tel: (902) 424-0377
Fax: (902) 424-7008
Website: www.gov.ns.ca/econ

Nova Scotia Human Rights Commission
(Central Office):
1690 Hollis St., 6th floor
P.O. Box 2221
Halifax, NS
B3J 3C4
Tel: 1-877-269-7699
TTY: (902) 424-3139
Fax: 424-0596
Website: www.gov.ns.ca/humanrights

Nova Scotia Labour Standards
5151 Terminal Road, 7th floor
P.O. Box 697
Halifax, NS
B3J 2T8
Tel: 1-888-315-0110
Fax: 424-0648
Website: www.gov.ns.ca/enla/labstand

Nova Scotia Alcohol and Gaming Authority
40 Alderney Dr.
P.O. Box 545
Dartmouth, NS B2Y 3Y8
Tel: 424-6160
Fax: 424-4942
Website: www.gov.ns.ca/aga

Nova Scotia Utility and Review Board
Motor Carrier Division
1601 Lower Water Street, Suite 300
P.O. Box 1692
Halifax, NS B3J 3P6
Tel: (902) 424-3588
Fax: (902) 424-3919
Website: http://www.nsuarb.ca

Nova Scotia Workers Compensation Board
Main Office (Halifax)
5668 South Street
P.O. Box 1150
Halifax, NS B3J 2Y2
Tel: 1-800-870-3331 (Halifax)
Website: www.wcb.ns.ca

Nova Scotia Workers Compensation Board
Branch Office (Sydney)
336 Kings Rd., Suite 117
Sydney, NS B1S 1A9
Tel: 1-800-880-0003
Website: www.wcb.ns.ca

Office of the Fire Marshal
Nova Scotia Environment & Labour
5151 Terminal Rd., 6th Floor
P.O. Box 697
Halifax, NS B3J 2T8
Tel: 1-800-559-3473
Fax: (902) 424-3239
Website: www.gov.ns.ca/enla/ofm

Nova Scotia Transportation & Public Works
1672 Granville St.
PO Box 186
Halifax, NS B3J 2N2
Tel: 424-2297
Fax: 424-0532
Website: www.gov.ns.ca/tran

Provincial Tax Commission
P.O. Box 755
1505 Barrington St.,
8th floor, Maritime Centre
Halifax, NS B3J 2V4
Toll free: 1-800-565-2336
Tel: 424-6300
Fax: 424-0602
Web: www.gov.ns.ca/snsmr/taxcomm

Nova Scotia Registry of Joint Stock Companies
PO Box 1529
Halifax, NS B3J 2Y4
Tel: 1-800-225-8227
Fax:(902) 424-4633
Website: www.gov.ns.ca/snsmr/rjsc
Registration of company and NUANS search of business name.

Nova Scotia Museum
Website: http://museum.gov.ns.ca

Federal Government

Atlantic Canada Opportunities Agency (ACOA)
1801 Hollis St., Suite 600
P.O. Box 2284, Station M
Halifax, NS B3J 3C8
Tel: 426-6743
Fax: 426-2054
Toll free: 1-800-565-1228
Website: www.acoa-apeca.gc.ca

Industry Canada
Corporations Directorate
365 Laurier Avenue West, 9th floor
Jean Edmonds Tower South
Ottawa, ON K1A 0C8
Tel: 1-866-333-5556
Fax: (613) 941-0601
Website: www.corporationscanada.ic.gc.ca
Federal registration of corporations.

Industry Canada
Competition Bureau
50 Victoria St.
Gatineau, PQ K1A OC9
Tel: 1-800-348-5358
Fax: (819) 997-4282
Website: www.cb-bc.gc.ca

Enterprise Cape Breton Corporation
Commerce Tower, 3rd floor
15 Dorchester St.
Sydney, NS B1P 6T7
Tel: 564-3600
Fax: 564-3825
Toll free: 1-800-705-3926
Website: www.ecbc.ca

Canada Revenue Agency
Business Services
Website: www.cra-arc.gc.ca
Payroll, GST/HST
Business Account Registration
Corporations (taxation)
Sole Proprietorships/Partnerships

Canada Revenue Agency
Tax Services Offices:
Halifax
Ralston Building
1557 Hollis St.
P.O. Box 638
Halifax, NS B3J 2T5
Fax: (902) 426-7170

Sydney
47 Dorchester St.
P.O. Box 1300
Sydney, NS B1P 6K3
Fax: (902) 564-3095

Statistics Canada (Atlantic Office)
1741 Brunswick Street
Box 11, 2nd Floor
Halifax, NS B3J 3X8
Toll free: 1-800-263-1136
Website: www.statcan.ca
Population data, Canadian Travel Survey, International Travel Survey.

Office of the Privacy Commissioner of Canada
112 Kent St.
Place de Ville, Tower B - 3rd floor
Ottawa, ON K1A 1H3
Toll free: 1-800-282-1376
Tel: (613) 995-8210
Fax: (613) 947-6850
Website: www.privcom.gc.ca
Personal Information & Protection of Electronic Documents Act

Other Organizations

St. John Ambulance Training Offices
Headquarters for Nova Scotia Council
88 Slayter Street
Dartmouth, NS B3A 2A6
Tel: 463-5646
Fax: 469-9609
Website: www.stjohnambulance.ns.ca

Canadian Red Cross
1940 Gottingen Street
Halifax, NS B3J 3Y2
Tel: (902) 423-3680
Fax: (902) 422-6247
Website: www.redcross.ca
First Aid, Water Safety courses.

INDUSTRY ORGANIZATIONS/ SECTOR ASSOCIATIONS

National & International Organizations/ Associations

Canadian Tourism Commission (CTC)
55 Metcalfe Street, Suite 600
Ottawa, ON K1P 6L5
Tel: 613-946-1000
Website: www.canadatourism.com

International Festivals and Events Association (IFEA)
2601 Eastover Terrace
Boise, ID 83706
Tel: (208) 433-0950
Fax: (208) 433-9812
Website: www.ifea.com

Tourism Industry Association of Canada (TIAC)
803-130 Albert Street
Ottawa, ON K1P 5G4
Tel: 613-238-3883
Fax: 613-238-3878
Website: www.tiac-aitc.ca/

Provincial Sector Organizations/ Associations

Tourism Industry Association of Nova Scotia (TIANS)
1099 Marginal Road, Suite 201
Halifax, NS B3H 4P7
Tel: (902) 423-4480
Fax: (902) 422-0184
Website: www.tians.org

Affiliated Associations
(Same address, phone & fax as TIANS)

Campground Owners Association of Nova Scotia (COANS)

Nova Scotia Adventure Tourism Association

Nova Scotia B&B Association

Nova Scotia Festivals and Events Council
PO Box 1780
Liverpool, NS B0T 1K0
Tel/Fax: (902) 354-4500

Other Industry Organizations/Associations

Nova Scotia Tourism Human Resource Council
1099 Marginal Road, Suite 201
Halifax, NS B3H 4P7
Tel: (902) 423-4480
Fax: (902) 422-0184
Website: www.tourismhrc.com

Check In Nova Scotia
2695 Dutch Village Road, Suite 501
Halifax, NS B3L 4V2
Tel: 425-5781
Toll free: 1-800-565-0000
Website: www.checkinnovascotia.com
Nova Scotia Travel Information and Reservations.

Federation of Nova Scotian Heritage
1113 Marginal Rd.
Halifax, NS B3H 4P7
Tel: (902) 423-4677
Toll free: 1-800-355-6873
Fax: 422-0881
Website: www.fnsh.ns.ca

Hotel Association of Nova Scotia (HANS)
P.O. Box 473, Station M
Halifax, NS B3J 2P8
Website: www.novascotiahotels.ca

Nova Scotia Association of Unique Country Inns
Website: www.uniquecountryinns.com

Regional Tourism Industry Associations

Antigonish/Eastern Shore Tourist Association (AESTA)
RR #1 Musquodoboit Harbour, NS
B0J 2L0
Tel: 889-2362
Web: www.rewardyoursenses.com

Destination Cape Breton
PO Box 1448
Sydney, NS B1P 6R7
Tel: 563-4636
Fax: 564-5422
Website: http://www.cbisland.com

Central Nova Tourist Association
P.O. Box 1761, 577 Prince Street
Truro, NS B2N 5Z5
Tel: 893-8782
Fax: 893-2269
Website: www.centralnovascotia.com

Evangeline Trail Tourist Association
244 Main Street, PO Box 346
Middleton, NS B0K 1H0
Tel: (902) 825-4043
Toll free: 1-866-260-3882
Website: www.evangelinetrail.com

Pictou County Tourist Association (PCTA)
40 Water St.
P.O. Box 1839
Pictou, NS B0K 1H0
Tel: (902) 485-6151
Fax: (902) 485-4415
Toll free: 1-877-81-OCEAN
Web: www.tourismpictoucounty.com

South Shore Tourist Association (SSTA)
Box1390
Lunenburg, NS B0J 2C0
Tel: 634-8844
Fax: 634-8056
Website: www.sssta.com

Destination Halifax
1800 Argyle Street, Suite 802
Halifax, NS B3J 3N8
Tel: 422-9334
Fax: 492-3175
Website: www.destinationhalifax.com

Yarmouth County Tourist Association (YCTA)
Tel: 742-5355
Toll free: 1-866-850-9900
Web: www.aboutyarmouth.com

Regional Development Authorities

Antigonish Regional Development Authority
Farmer's Mutual Insurance Building,
Suite 2-, 188 Main St.
Antigonish, NS B2G 2B9
Tel: 863-3330 Fax: 863-4095
Website: www.antigonishrda.ns.ca

Cape Breton County Economic Development Authority
338 Charlotte Street, 3rd Floor
Sydney, NS B1P 1C8
Tel: (902) 562-2201
Fax: (902) 562-2866
Website: www.cbceda.org

Colchester Regional Development Agency
P.O. Box 181, 966 Prince Street
Truro, NS B2N 5C1
Tel: 893-0140
Fax: 897-1157
Toll free: 1-866-227-6182
Website: www.corda.ca

Cumberland Regional Economic Development Association
35 Church Street, Box 546
Amherst, NS B4H 4A1
Tel: (902) 667-3638
Fax: (902) 667-2270
Website: www.creda.net

Guysborough County Regional Development Authority
P.O. Box 49, 46 Main Street
Guysborough, NS B0H 1N0
Tel: 533-3731
Fax: 533-2064
Toll free: 1-800-355-3731
Website: www.gcrda.ns.ca

Halifax Regional Development Agency
11 Glendale Drive, Unit 9
Lower Sackville, NS B4C 3P2
Tel: 869-4040
Fax: 869-4091
Toll Free 1-800-650-0039
Website: www.hrda.ns.ca

Hants Regional Development Authority
Box 2313
Windsor, NS B0N 2T0
Tel: (902) 798-2284
Enfield Office: (902) 883-3338
http://www.hantscounty.com

Straits Highlands Regional Development Authority
P.O. Box 2200
32 Paint St.
Port Hawkesbury, NS B0E 2V0
Tel: 625-3929
Fax: 625-1559
Website: www.strait-highlands.ns.ca

Kings Community Economic Development Agency
28 Aberdeen Street, Ste. #5
Kentville, NS B4N 2N1
Tel: (902) 678-2298
Fax: (902) 678-2324
Website: www.kingsced.ns.ca

Pictou Regional Development Commission
Business Service Centre
980 East River Road
New Glasgow, NS B2H 3S5
Tel: (902) 752-6159
Toll Free: 1-888-412-0072
Fax: (902) 755-2722
Web: www.wearepictoucounty.com

South West Shore Development Authority
P.O. Box 131
Yarmouth, NS B5A 4B1
Tel: (902) 742-3210
Fax: (902) 742-3107
Website: www.swsda.com

Western Valley Development Authority
P.O. Box 278
86 Atlantic Ave.,
Cornwallis Park, NS B0S 1H0
Tel: (902) 638-8100
Fax: (902) 638-8101
website: www.wvda.com

Travel Trade Organizations

Canada

Association of Canadian Travel Agencies (ACTA)
130 Albert Street, Suite 1705
Ottawa, ON
K1P 5G4
Tel: 613-237-3657
Fax: 613-237-7052
Website: www.acta.ca

Canadian Bus Association (CBA)
451 Daly Avenue
Ottawa, ON K1N 6H6
Tel: 613-238-1800
Fax: 613-241-4936
Website: www.buscanada.ca

Ontario Motor Coach Association (OMCA)
4141 Yonge Street, Suite 306
Toronto, ON M2P 2A8
Tel: 416-229-6622
Fax: 416-229-6281
Website: www.omca.com

United States

American Bus Association (ABA)
700 13TH St., NW, Suite 575
Washington, DC 20005-5923
Tel: 202-842-1645
Toll free: 1-800-283-2877 (US and Canada)
Fax: 202-842-0850
Website: www.buses.org

American Society of Travel Agents (ASTA)
1101 King St., Suite 200
Alexandria, VA 22314
Tel: 703-739-2782
Fax: 703-684-8319
Website: www.astanet.com

Group Leaders of America, Inc. (GLAMER)
P.O. Box 129
Salem, OH 44460
Tel: 1-800-628-0993
Fax: 330-337-1118
Website: www.glamer.com

International Association of Convention & Visitor Bureaus
2025 M Street, NW Suite 500
Washington, DC 20036
Tel: 202-296-7888
Fax: 202-296-7889
Website: www.iacvb.org

National Tour Association
546 E. Main Street
Lexington, KY 40508
Tel: 606-226-4444
Toll free: 1-800-682-8886
Fax: 606-226-4414
Website: www.ntaonline.com

Travel Industry Association
1100 New York Avenue, NW, Suite 450
Washington, DC 0005-3934
Tel: 202-408-8422
Fax: 202-408-1255
Website: www.tia.org

Travel and Tourism Research Association (TTRA)
PO Box 2133
Boise, ID 83701-2133
Tel: 208-853-2320
Fax: 208-853-2369
Website: www.ttra.com

United States Tour Operators Association (USTOA)
275 Madison Avenue, Suite 2014
New York, NY 10016
Tel: 212-599-6599
Fax: 212-599-6744
Website: www.ustoa.com

APPENDIX II

Festival/Event Visitor Survey

APPENDIX II

A sample visitor survey questionnaire for a festival/event is presented on the following pages. Depending on the resources you have available, and your specific objectives in undertaking the survey, you should select the questions you want to use from those presented. You may want to add some other questions that address specific issues you are interested in researching. As well, you may want to customize some of the questions to reflect the nature of your festival/event, your marketing activities, etc.

Information collected from this survey can be used to help measure the economic impacts of your festival/event on the local community/area. To do this, you will also need to have data on the number of visitors to your festival/event, you will need to make sure that your visitor survey is administered to randomly selected visitors and you will need to have a sufficient number of completed surveys.

It is recommended that you talk to staff at the Department of Tourism, Culture and Heritage (Research staff in particular) to get some advice on undertaking this type of research.

Sample Festivals and Events Visitor Survey

A: Information on Visitors to the Festival or Event

1. What is your home province or state, or country for international visitors?

Province _______________ State_______________ Country _______________

If you live in Nova Scotia, do you live in the local community or within 40 km? Yes ☐ No ☐

2. In which of the following age categories do you fall?

15 – 24 ☐ 25 – 34 ☐ 35 – 54 ☐
55 – 64 ☐ 65 plus ☐

3. Gender of respondent (by observation)

Male ☐ Female ☐

4. How many people are visiting the festival with you today? Include yourself and those you are sharing expenses with. ___________ (Number of people)

5. Which of the following best describes your party?

By yourself ☐ As a couple ☐ As a family ☐
As 2 or more friends ☐ As a couple with friends ☐

B: Information on their Visit to Your Festival/Event

6. How did you hear about this festival/event?

Word of Mouth ☐
Festival Web site ☐
Radio Advertising ☐
Newspaper/Magazine ☐
Festival Poster/Brochure ☐
Sponsor Advertising ☐
Nova Scotia Festivals & Events Guide ☐
Other Web site (e.g. Tourism Nova Scotia) ☐
Visitor Information Centre ☐
Other Advertising ☐
Just Driving By/In the Community ☐
Other, please list ____

7. Have you attended this festival/event prior to this year?

Yes ☐ No ☐

If yes, how many years have you attended the festival? __________

8. How long did you spend at the festival/event?

1 hour or less ☐ 1 – 2 hours ☐ ½ day ☐
A full day ☐ More than one day ☐

9. How much money did the group you are with spend at the festival/event today?

On Admissions/Tickets/Activities $ ____________
On Food & Beverage $ ____________
On Merchandise/Retail $ ____________
Other $ ____________
Total $ ____________

10. Overall, would you say that the festival/event has met your expectations, exceeded your expectations or not met your expectations?

Met Expectations ☐
Exceeded Expectations ☐
Not met Expectations ☐

11. Overall, how would you rate the festival/event on each of the following factors? Would you say (*read each of the categories)* is?

	Excellent	Good	Fair	Poor	No Opinion
Quality of activities	☐	☐	☐	☐	☐
Quality of entertainment	☐	☐	☐	☐	☐
Quality of food service	☐	☐	☐	☐	☐
Quality of Merchandise	☐	☐	☐	☐	☐
Add others as appropriate					
Overall quality	☐	☐	☐	☐	☐

12. How likely would you be to attend the festival/event again next year?

Very Likely ☐ Somewhat Likely ☐ Not Very Likely ☐ Not At All Likely ☐

13. How likely are you to recommend this festival/event to friends or relatives?

Very Likely ☐ Somewhat Likely ☐ Not Very Likely ☐ Not At All Likely ☐

14. In your opinion, what, if anything, could the organizers do to improve this festival/event?

____
____
____
____

C: Role of the Festival/Event in their Trip

15. How long are you staying in this community/area of the province on this trip?

½ day ☐ 1 day (not overnight) ☐ Overnight ☐ Number of Nights __________

16. a) On a scale of 0 – 10, please indicate the role the festival/event played in your decision to visit this community or area of Nova Scotia on this trip? A 0 rating means that the festival/event was not a factor at all in your decision to visit whereas a 10 means that the festival/event was the main (and only) reason for your trip to the community/area.

1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐
Not a Reason Main/Only Reason

b) If you answered 0 –5 on the scale above, was the festival/event the reason you extended your stay in the community/area?

Yes ☐ No ☐

c) If yes to 16b, how much longer did you stay in the community/area because of the festival/event?

½ day ☐ 1 day (not overnight) ☐ Overnight ☐ Number of Nights __________

17. Can you estimate how much your party will spend, in total, on your visit to this community/area of the province?

On accommodations/campgrounds	$__________
On restaurant meals	$__________
On groceries and liquor	$__________
On automobile related expenses (gas, etc.)	$__________
On retail purchases (gifts, souvenirs, etc.)	$__________
On recreation	$__________
On other items	$__________
Total	$__________

D: Information about the Visitor

18. Please indicate which of the following best describes the highest level of education attained within your household.

High school incomplete ☐
Some Technical School/College ☐
Some University ☐
N/A or Refused ☐
High school complete ☐
Technical School/College Complete ☐
University Complete ☐

19a). Is your annual household income (before taxes) greater than $40,000
Yes ☐ No ☐, If No, terminate the interview N/A or Refused ☐

b) And is it greater than $80,000
Yes ☐ No ☐

Thank you very much for your time. Please be assured that all the information you provided to us will be kept strictly confidential.

Guides in the Series

A Guide to Starting & Operating
a Commercial or Community Attraction

A Guide to Starting & Operating
an Adventure Tourism Business

A Guide to Starting & Operating
a Retail Tourism Business

A Guide to Community Tourism Planning

A Guide to Starting & Operating
an Accommodation Business

A Guide to Starting & Operating
a Campground Business

A Guide to Starting & Operating
a Restaurant Business

A Guide to Starting & Operating
a Local Sightseeing Tour Business

A Guide to Starting & Operating
a Receptive Tour Operator Business

A Guide to Starting & Operating
a Local Visitor Information Centre

A Guide to Planning & Hosting
a Community Festival or Event

A Guide to Marketing Your
Nova Scotia Tourism Business

Guides are available by visiting
www.gov.ns.ca/dtc/tourism/tourism_devguides.asp

NOVA SCOTIA
Come to life
novascotialife.com